Democratic National Committee

PLAYBOOK

A GUIDE FOR COORDINATED CAMPAIGNS & STATE PARTIES



Friends,



The stakes could not be higher for our country, which is why, over the past year, Democrats have won tough races up and down the ballot through aggressive, innovative organizing and clear communication on the policies and values that resonate with voters. Our path to victory in 2026 demands that we keep building this momentum: organizing everywhere, speaking with conviction, and being the party that truly listens to and serves the communities we represent.

To accomplish that mission, the Democratic National Committee is releasing a first-ever Organizing and Political Playbook to inform how to build winning campaigns in 2026. This is the first time the DNC has collected and distributed best practices from across the ecosystem — marking a meaningful shift in how we support state party leaders, campaign staff, and partners on the ground. As a result, this Playbook provides both data and resources, as well as a clear perspective on how to win right now.

The goal of this guide is to be practical and actionable. The Playbook Includes:

- **ORGANIZING RE-MODEL:** introduces cornerstone organizing principles, strategic shifts for organizing programs, and a newly designed day in the life of an organizer.
- **CASE STUDIES:** features 9 case studies highlighting innovations in organizing — such as Swing Left's "Ground Truth" canvassing program and findings from the DNC's Black & Latino Polling in VA & NJ in 2025.
- **BEST PRACTICES:** includes best practices for every department on a campaign – from Cybersecurity to Influencer Engagement.
- **TECH PILOT LEARNINGS:** published results from our 2025 organizing technology pilots. We tested four new organizing tools across the country to improve how we target and reach voters.

Everything in these pages revolves around one core tenet: connection with voters matters more than the attempts we make. The DNC is all gas, no brakes as we rethink our party's approach to campaigning. This guide is meant to empower you, our party's most valuable resource, to be as effective as possible. As you refine your approach and push boundaries, do what works best for your campaign and know that your work is the engine of Democratic victories. By utilizing the collected lessons in this playbook, we will do more than improve our campaigns — we will build the durable, long lasting infrastructure that helps us win this moment and win the future. We have to build to win and build to last. Thank you for your leadership and commitment. Let's get to work.

Sincerely,

KEN MARTIN
Chair, Democratic National Committee

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ORGANIZING RE-MODEL

A NEW DAY IN ORGANIZING

As Democrats, the approach we have taken to organizing is not fit for the moment we find ourselves in. As we attempted to execute on the tried and true tactics of the past, we miscalculated their efficacy and missed opportunities to question how they evolve for the here and now. The urgency of solving these challenges is only increasing as our elections and voting rights face unprecedented attacks.

THE URGENCY OF THE MOMENT

Voters can now screen unknown numbers on their cell phones and put cameras outside their doors. They now consume a majority of their news online and through social media. But, more importantly, voters and volunteers alike expect more from candidates and campaigns than a phone call, door knock, lit drop, or social post.

Voters are seeking connection, authenticity, and concrete proposals for a more fair and affordable future. We heard this call loud and clear in 2025 and Democrats responded with inspiring, creative, and connective campaigns. And we won.

Now it is time to document our learnings and continue to evolve the way we reach diverse groups of voters successfully.

> **This moment demands a revision, an overhaul: an Organizing Remodel - one that rewrites the structures and assumptions that define campaigns and the day-to-day work of an organizer.**

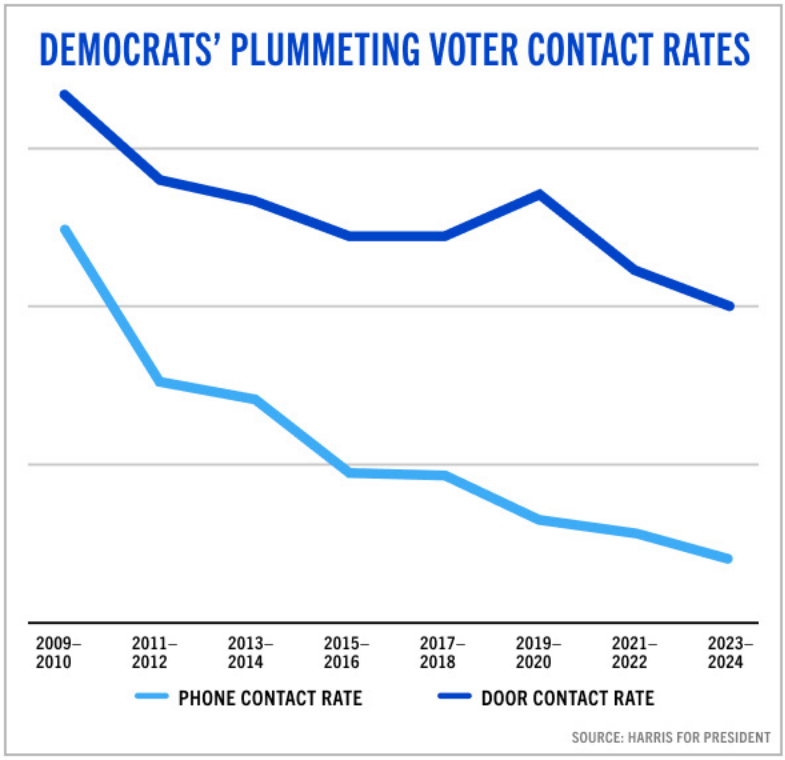
This remodel is the beginning of an overdue conversation, not the end of it. We encourage you to take what is helpful and leave what is not. No group of candidates, states, or campaigns are the same. You know what works where you are. More than anything, we hope you will embrace the important principles around connecting with voters and that you'll continue the conversation in your own communities.

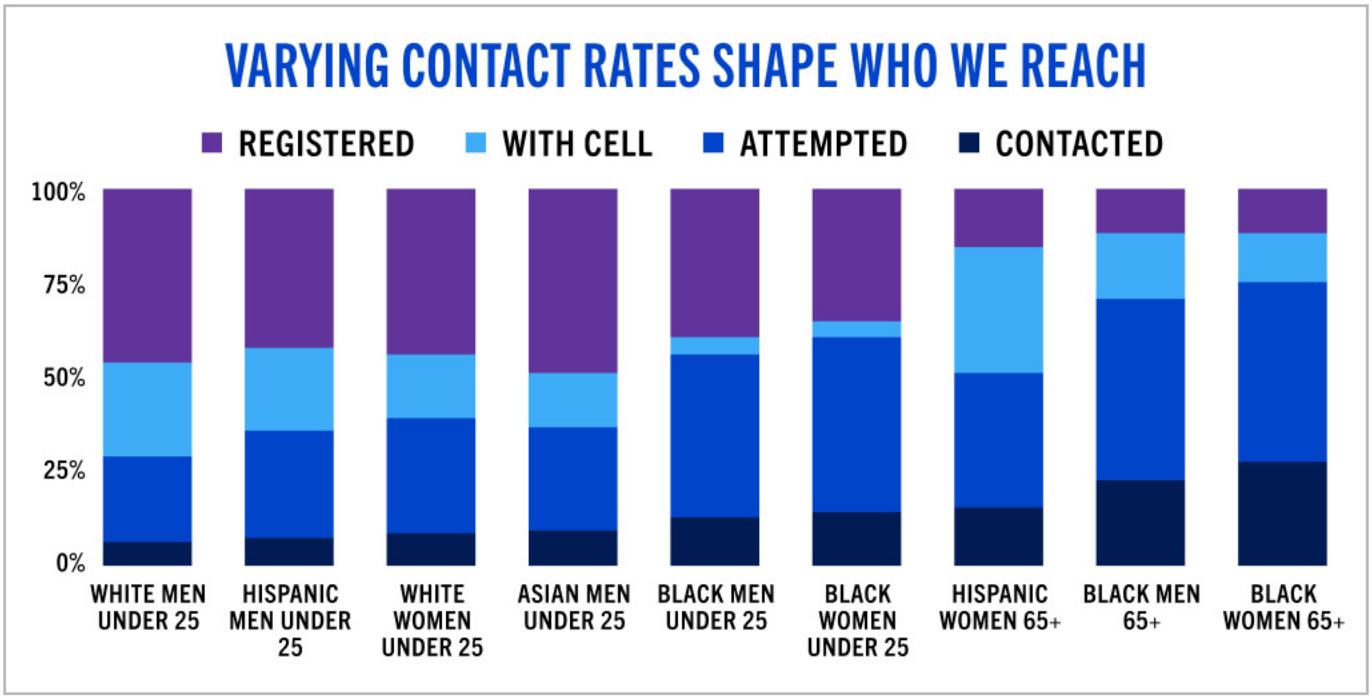
HOW WE GOT HERE

Over the past decade, the Democratic campaign industry and its funders have become obsessed with massive, shiny output numbers from traditional tactics: Millions of calls made and hundreds of thousands of doors knocked. Yet this fixation with output has created an illusion of progress that fails to answer the questions that determine electoral success: *how many voters were meaningfully contacted? What was the impact of those conversations, and what was the follow up? Which voters did we not reach through these traditional tactics and how are we effectively engaging those voters in other ways to ensure they turn out?*

Despite making 300+ million phone calls in 2024 – more than any campaign in history – only 3% of the calls the Harris campaign made actually resulted in a contact with a voter.

At scale, this organizing model rewards transactional voter contact: *call the voter, repeat the script, log a result, and move on*. This model provides no incentive for organizers and volunteers to actually build relationships with the voter, follow up, and feel ownership to move them closer towards turnout over the course of the cycle. The problem goes a step further: varying contact rates across different demographics using 'traditional' tactics has limited who the campaign can actually reach. In 2024, the Harris campaign contacted 28% of Black women registered to vote over the age of 65; meanwhile, they contacted only 7.5% of Latino men registered under the age of 25.





In this model, the role of an organizer has become significantly more narrow. When success for an organizer is defined by quantity over quality, they spend most of their day tethered to their laptop inside a field office, disconnected from their turf, focused on making hundreds of cold calls rather than showing up and building connections face-to-face with voters. The traditional model also left many organizers underprepared for the demands of this role.

> **In a post-2024 research study conducted by Trestle Collaborative, 60% of organizers rated their onboarding and training as "non-existent" to "average."**

THREE STRATEGIC SHIFTS

The 'traditional' tactics and status quo for the day in the life of an organizer are insufficient to win in 2026. To meet this moment, the DNC is introducing cornerstone organizing principles and three strategic shifts for organizing programs moving forward, applicable to campaigns of every size:

1. **MODERNIZE OUR ORGANIZING TACTICS TO REACH MORE VOTERS,** by incorporating new voter contact methods beyond traditional doors and phones to allow us to have more conversations and provide more volunteer opportunities for supporters.

2. **PRIORITIZE BUILDING RELATIONSHIPS WITH VOTERS,** to ensure organizers and volunteers treat voter outreach as an ongoing process rather than isolated, one-time contact attempts.

3. **REDESIGN THE DAY-TO-DAY WORK OF AN ORGANIZER,** to reflect how we can effectively reach voters today online and offline. Campaigns should merge 'traditional,' digital, and coalitions organizing under one unified department.

ORGANIZING RE-MODEL: CORNERSTONE PRINCIPLES FOR 2026

As we head toward 2026, one thing is clear: **Connection matters more than attempts**. The DNC's **Organizing Re-Model** recenters our work around relationships, leadership, and community. Organizing and organizers are the key to change and to a permanent campaign; they are the human capital and human intelligence necessary to leverage modern tools and utilize approaches that put people and their concerns first. The Cornerstone Principles outlined below are not abstract values. They are standards that should shape the plans we build in 2026, from staffing models and scripts to how and where organizers spend their time.

1. CONNECTION IS THE STRATEGY

Voter conversations, especially face-to-face conversations, remain the most powerful organizing tool we have. But their power depends on execution. A conversation is not complete because a script was read or a survey was filled out. It is complete when a connection occurs; when there is a level of expressed understanding and empathy; when there is a sense from the voter that the person knocking on their door 'gets' them.

In 2026, conversations must be designed, defined, and measured by their depth and impact. Organizers and volunteers should be empowered to listen, engage, and respond as people, not just as messengers. Connection is the mechanism through which persuasion, trust, and turnout are built. Face to face organizing is why movement politics can be so powerful. Doing this requires two way engagement. One way communication can deliver a message, but two way engagement can demonstrate if that message is working, help drive decisions, and provide insights to inform adjustments.

2. COMMUNITY IS THE WORK

Organizing is about people, but too often our work stays confined to field offices and call lists. Real trust is built outside our office doors. Organizers and campaign leaders must spend meaningful time in the communities they seek to mobilize, at local events, gathering spaces, and small businesses.

Campaigns should also create welcoming, purpose-built spaces within their offices that meet real community needs, particularly for people least likely to engage with a campaign. Trust begins with presence and service. Our message breaks through because of community connection.

3. LEADERSHIP IS THE MULTIPLIER

Campaigns, by nature, contain some of the most complex leadership challenges that exist, scaling from zero to tens of staff in a matter of months. Yet, since COVID, our talent pipelines have weakened, leaving too many staff underprepared for the roles they are asked to fill.

Strong strategy cannot compensate for weak leadership. Evaluating an organizing program requires assessing not just the plan, but the people executing it. Campaign staff must be ready to lead, and when they are not, training and development must be a priority. That means designing programs to grow leaders, not recreating staffing models that consistently produce the same gaps.

PRO TIP
You can find best practices, templates, and case studies about investing in your campaign's staff in the Case Study about Staff Hiring & Management Best Practices.

SHIFT 1: MODERNIZE OUR ORGANIZING TACTICS TO REACH MORE VOTERS

Relying predominantly on targeted doors and phones is no longer sufficient to engage the voters Democrats need to win. By relegating any other tactics as "nice-to-haves," campaigns are missing countless organic interactions with voters that take place outside of targeting models and pre-defined phonebank lists. For an organizer, this might include a conversation with their barista at the local coffee shop or chatting with a group of people gathered outside a house not on a walk list. When an organizing program's core tactics only reward targeted doors and dials, staff have no incentive to organize everywhere, all the time — and campaigns limit their own reach.

Therefore, campaigns must expand the set of organizing tactics beyond doors and phones by intentionally selecting additional 'non-traditional' tactics that can most effectively reach voters in each region, across each phase of the campaign. Expanding the menu of tactics creates more entry points for voters to interact with the campaign — especially those who are more likely to be missed by standard targeting or are harder to reach through traditional tactics alone.

We must think through ways to effectively organize communities, so that neighbors are talking to neighbors. If not, Democrats will continue to rely on ineffective tactics, acquiescing to an ecosystem defined by its tools as opposed to designing an effective ecosystem centered on voters. This requires starting earlier and a healthy dose of imagination to facilitate experimentation and innovation.

List-Based Tactics	Expansion (Non-Traditional) Tactics	
• Door to Door Canvassing • Phonebanking • P2P Texting	• Volunteer Relational Outreach • Voter Registration • High Traffic Canvassing • Tabling • Flyering	• Layering (Contacted Voter Follow-Up) • Blanket Knocking • Digital Content Sharing • Attending & Leading Service Events • Hosting Community Events; Workshops

Organizing programs should be intentional about where these expansion tactics could be most impactful, especially where traditional contact rates are lowest, such as regions with more transient populations or limited volunteer density. In these contexts, organizers can reach more voters by prioritizing tactics that allow them to meet voters where they already are, whether that be through high-traffic canvassing at community events, flyering at local small businesses, or relational outreach through supporters' networks.

Importantly, expanding the set of organizing tactics will expand volunteer participation. By broadening what counts as a volunteer shift beyond doors and phones, campaigns create more accessible pathways for supporters to get involved — especially those with limited time or non-traditional work schedules.

This expansion of tactics will require campaigns to redefine what constitutes a volunteer shift. As such, our organizing re-model introduces a new metric — a Capacity Shift — to capture a broader range of volunteer activity. This shift type literally builds capacity by reaching volunteers that may not be ready to sign up for a door or phone shift. This metric ensures that organizers get credit for the wider range of tactics they are utilizing to reach voters and engage volunteers, and reflects the full scope of engagement by the campaign in the lead-up to GOTV.

Knocking doors should continue to dominate volunteer activity, but we encourage campaigns to be thoughtful about where they can employ these other tactics:

- In a specific neighborhood or region with lower-than-average contact rates, or
- In the early phases of a campaign when you are growing your volunteer base

Metric	Definition

• Capacity Shift Completed	• Volunteer action with the campaign, inclusive of:
	  • traditional (doors, phones) and
	  • non-traditional voter contact tactics used by the campaign. This may include, but is not limited to: flyering, high traffic canvassing, hosting events, blind knocking, digital content sharing, relational outreach, and voter follow-up.

SHIFT 2: PRIORITIZE BUILDING RELATIONSHIPS WITH VOTERS

Campaigns must invest in building relationships with voters with the same level of intentionality as campaigns do in sustaining relationships with their volunteers.

Our new model shifts voter engagement from singular, isolated contacts to a structured **Voter Engagement Lifecycle**, wherein each contact with a voter is contextualized within the campaign's ongoing effort to move them toward turnout. Tactically, this means that every interaction with a voter should result in immediate follow-up. *Showing up at a voter's door, collecting a support ID, and walking away is insufficient*. Instead, every interaction should trigger the next stage of engagement and a new layer of contact. At the conclusion of every voter interaction, an organizer or volunteer should be prompted to answer: **"What's the next action we should take to engage this voter?"**

Each follow-up with a voter is treated as an additional layer of engagement and will help campaigns reduce drop-off between a voter's first contact and Election Day.

We define this practice of systematic voter follow up as **layering**. Layering should be treated as a defined organizing tactic and qualify as a volunteer shift. Organizers should train and deploy volunteers specifically to own voter follow-up, ensuring that voters receive timely and relevant next touches. By formalizing layering, campaigns make relationship-building with voters more measurable and central to how organizing programs operate.

Layering will fundamentally change how organizers approach their roles. When an organizer knows that every interaction must lead to follow-up, they become accountable to the voter's entire lifecycle with the campaign, not just the initial attempt. That accountability will reshape how they train volunteers to have conversations with voters, thereby making it tangible for them that their job is to build a relationship that is capable of persuading the voter to turn

PRO TIP
As traditional phone banking activity continues to decline, layering is a great activity to task your phonebank volunteers with.

VOTER ENGAGEMENT LIFECYCLE

Following the story of Maria: How multi-touch "Layering" transforms a casual encounter into a win.

SATURDAY DAY

Meeting Voters Where They Are

Maria is a mom of three and works full time. An impact organizer named Randi, meets Maria while high traffic canvassing outside a grocery store on Saturday. Randi invites Maria and her family to a free Community Dinner at the field office.

SATURDAY EVENING

Data Entry

When Randi is done canvassing, she logs her interaction with Maria in VAN.

SUNDAY

Layering

The next day, Randi, with the help of her volunteer, Susan, sends a text to all of the people she met outside the grocery store.

WEDNESDAY

Impact Event

On Wednesday, Maria attends the community dinner. While she's there, she learns more about the candidate and gets information on local food banks. She gets to know the team and tells Randi she has a daughter who will be old enough to vote in the upcoming election.

2 WEEKS LATER

Voter Registration

Two weeks later, another volunteer, Joseph, knocks on Maria's door. He confirms Maria is supporting the candidate and registers Maria's daughter, Ellen to vote.

As campaigns rethink how they build and sustain support, organizing programs must also rethink how we communicate and what we consider a high-quality conversation.

Over the last decade, voter contact scripts have barely evolved on hard side campaigns. Even when we try to innovate, we often default to the same formula: *Greet, ID, Persuade, Close*. And, while IDs are critical, we know that we are missing important insight into what voters actually need from us and what it will take to earn their trust and their vote.

If we want different outcomes, our conversations must go deeper. That means slowing down, listening more than we speak, and prioritizing genuine understanding — even when it takes more time.

While every state and campaign will be different, the examples below should help you craft a script that is ready-made for connecting with voters, especially in early phases of the campaign. **These are EXAMPLES, not scripts that are set in stone.**

PRO TIP
Write scripts that work for various conversation scenarios and your specific campaign. You do not have to use this exact language. Deep listening script examples can be found in the Case Studies for Swing Left's Ground Truth program and the DNC's Local Listeners program.

AS YOU ARE WRITING YOUR SCRIPTS, YOUR CAMPAIGN SHOULD ALSO BE DEVELOPING METHODOLOGIES FOR:

1. Collecting and making use of the qualitative data you receive from voters.
   a. How will you learn from what voters are telling you?
   b. How will you respond in real time to what you're learning on the doors?
   c. What parts of the campaign should these learnings impact?

2. Training AND retraining staff and volunteers to be expert connectors.
   a. How will you ensure volunteers sound natural on the doors?
   b. How will you quality control script usage?
   c. How will you make sure training is continual?

OLD CONVERSATION MODEL

ID First, Listen Last

INTRODUCTION

"Hi, I'm a volunteer with the [CANDIDATE]. How are you today?"

WHAT'S NOT WORKING
Impersonal, lacks connection to the local community.

THE ID

"[CANDIDATE] is fighting to lower costs right here in our community. I was wondering if I could count on your vote for [CANDIDATE] in the upcoming election?"

WHAT'S NOT WORKING
Does a good job mentioning an important candidate issue, but assumes what the voter cares about without an invitation to discuss anything else. It also asks the voter about a candidate they may not know much about without any meaningful introduction or relationship.

PERSUASION

"What issue matters most to you in the upcoming election?"

"I understand and also care about reproductive justice. Too many women in our country are suffering under unjust laws. That's why I'm proud to be volunteering for [CANDIDATE] who believes [TALKING POINTS]."

WHAT'S NOT WORKING
The attempt to relate moves away from the voters' concern too quickly and fails to interrogate WHY the voter cares about this issue.

RE-ID

"Now that you know more about [CANDIDATE], can we count on your vote?"

WHAT'S NOT WORKING
Presumes one talking point or policy will shift the voter's opinion without any additional conversation or information.

CLOSE

"Thank you, have a nice day."

WHAT'S NOT WORKING
Polite, but leaves the voter with no opening for future discussion or engagement.

NEW CONVERSATION MODEL

Listen First, ID After

INTRODUCTION

"Hey there! I'm your neighbor, Brittany. I live/work just around the corner in [COMMUNITY] and I'm out listening to voters today with [CANDIDATE] campaign. How's your Saturday?"

WHAT'S WORKING
Provides a warm and personal introduction that grounds the interaction within the context of the local community. Humanizes the volunteer.

UNDERSTANDING

"I'm out here in the neighborhood today because costs are out of control — it's really been a struggle for me and some of our other neighbors. How have things been for you and your family lately? *[Tailor this to your campaign + candidate]*

WHAT'S WORKING
Introduces an important issue in the context of the volunteer's own life as a shared experience and demonstrates a genuine interest/concern in the voter's life. Allows an opening for the voter to talk about whatever they want.

LISTEN WITH CURIOSITY

"I really appreciate you sharing that with me. What things might you like to see a politician do to solve that/these problems?"/ "What makes you hopeful/ doubtful things will get better?"

WHAT'S WORKING
Acknowledges the value of the voter sharing openly and invites the voter to go deeper to elicit their values, experiences and insights.

REFLECT AND CONNECT
(THE OLD PERSUASION)

"It sounds like a lot of politicians haven't delivered on their promises and I know how frustrating that can be. I'm out knocking doors because I've been waiting for a candidate I can count on to actually deliver. I have gone long stretches without any medical insurance and it always left me feeling so vulnerable. I am so filled with hope because [CANDIDATE] has followed through on [X tangible plan] to make life better for people like us."

WHAT'S WORKING
Demonstrates to the voter that their concerns were understood. Shares a personal story that relates to both the voter's concerns and a concrete plan from the candidate.

PRO TIP
Assume you need to persuade everyone! Instead of just persuading people who tell you they are undecided, speak to everyone like you care about what they think!

ID AT THE CLOSE

"I can't tell you how much I appreciate you sharing your thoughts with me — I know how personal these issues can be. Are you open to voting for someone like [CANDIDATE]?"

WHAT'S WORKING
Reiterates appreciation for the voter's time. Provides the voter some safety in being honest now that they have made a connection with the volunteer.

KEEP THE DOOR OPEN

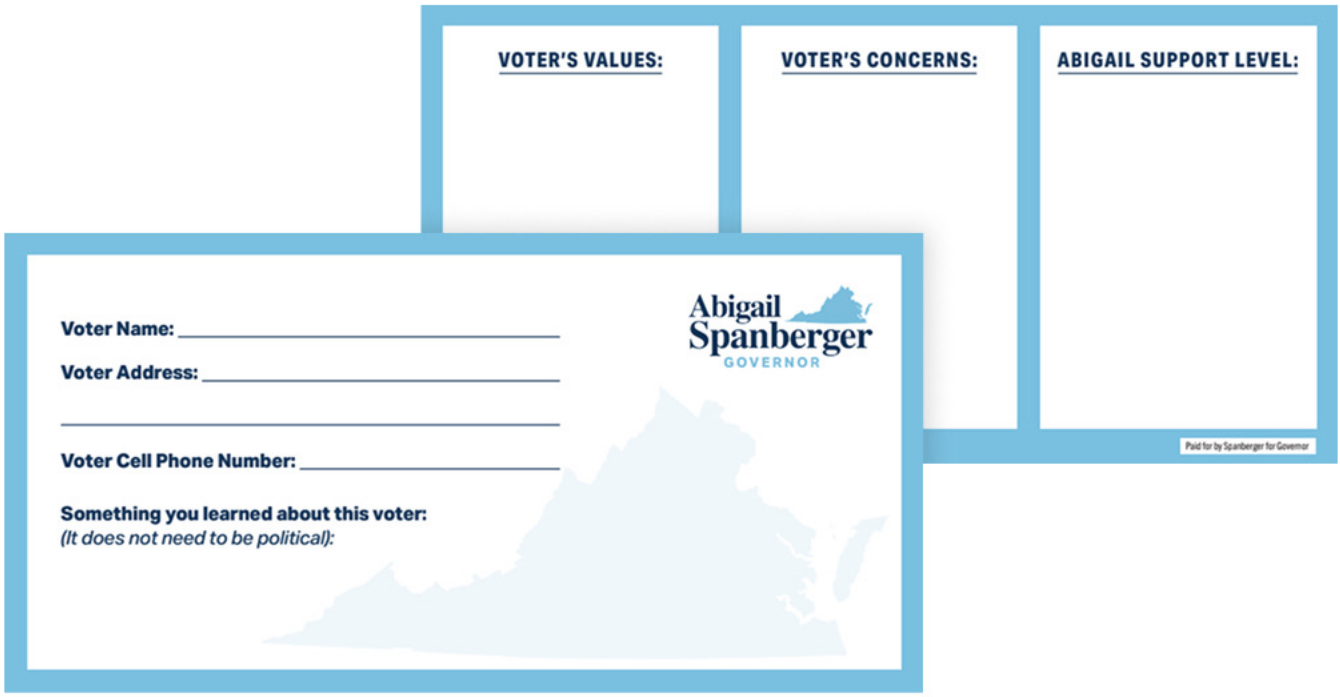
"I'm so glad we connected today, it's been great getting to know you better. We get together every Thursday at [X Office] for dinner — we'd love to have you and your family sometime. Here's an invite! I'll swing by again down the road to check in, have a great day!"

WHAT'S WORKING
Invites the voter to continue to engage with the campaign and lets them know we intend to earn their vote by continuing the conversation.

MEASURING QUALITY CONVERSATIONS

Moving away from traditional scripts will not only change how volunteers speak with voters, but how campaigns track these interactions. When volunteers are being trained to listen and ask questions to really get to know voters, the campaign needs a clear definition of what qualifies as a meaningful voter conversation. As such, our organizing re-model introduces a new metric — a Voter Conversation — to provide structure to more precisely define a successful voter interaction, rather than just a contact attempt. This will ensure campaigns can accurately measure high-quality voter contact, rather than just the volume of outreach.

Metric	Definition
• Voter Conversation	A quality conversation is defined by meaningfully advancing a voter along the campaign's path to persuasion and turnout. This should, at minimum: • Include the collection of substantive information (such as candidate support, issue priorities, contact information) and, • Identify a clear next step for follow-up. As an example, this interaction could be measured by how far a volunteer gets through a script, or the completion of a CTV card. As organizing tools catch up to this moment, you may need to be creative about how you track conversations outside of VAN. See how campaigns in Nevada and Virginia used a "Better Know a Voter" card to track quality conversations.



Examples of the 2025 Virginia Coordinated Campaign's Better Know a Voter card. These were utilized going door-to-door and high-traffic canvassing to ensure that volunteers were having high-quality, detailed conversations with voters.

SHIFT 3: REDESIGN THE DAY-TO-DAY WORK OF AN ORGANIZER

A campaign's organizing strategy only works if the staff structure reinforces it. That's because the way a campaign is structured directly informs how voter engagement happens: who is reaching out to which voters, in what ways, and when.

In this section, we outline three core shifts in organizational design that apply to organizing programs of any size, as well as tactical recommendations to operationalize this new organizational design on a statewide coordinated campaign.

In recent cycles, many large-scale organizing programs have been structured in ways that fragmented their core functions and underinvested in staff development to ensure these programs could be implemented effectively.

Organizing models that segment "digital" (Engagement) and "traditional" (Field) organizers based on the tactics that they used to recruit volunteers are not only inefficient for organizers, but result in a fragmented volunteer experience. Coalition engagement should not be siloed or disconnected from the day-to-day work of an organizing team. Doing so undermines a campaigns' abilities to mobilize key constituencies effectively at scale. From a voter's perspective, campaign outreach does not exist in departments. They will see a post online, receive a phone call to volunteer, and interact in-person with a campaign staffer at a local community event. Digital outreach and coalition building among diverse constituencies are not parallel efforts to organizing — they *are* organizing.

Organizing programs must have staff dedicated to leadership development and ongoing training. While most battleground states have Training staff, their responsibilities typically focus on onboarding and initial orientation rather than sustained coaching and professional development. As a result, first-time managers lack the ongoing support they need to be effective and organizers don't receive the consistent training needed to implement the program.

These learnings demand three core shifts in campaign organizing department design:

1. Treat digital organizing as organizing.

Separating digital organizing from the organizing department misunderstands how voters communicate, build relationships, and engage today, both online and offline. All organizers should be expected to utilize digital tools, tactics, and social media networks as a core method of volunteer recruitment, such as email newsletters, volunteer group chats, and posting in online community groups.

2. Integrate coalitions and impact programming as core organizing functions.

Engaging diverse constituencies effectively and at scale requires structure, resources, and close alignment with the broader organizing strategy. This programming is essential to reach supporters and persuadable voters that the campaign is less likely to reach through traditional methods.

3. Invest in management training and leadership development.

The most valuable asset a campaign has is their people, and it's imperative that campaigns invest in the professional development of their staff and managers to ensure they are set up for success to lead high-performing teams. For larger-scale campaigns, training teams should be responsible for leading management training.

PRO TIP
Learn more about best practices to engage diverse constituencies in the Community Power section, and more about investing in management training in the Hiring & Management Best Practices section.

OPERATIONALIZING THESE SHIFTS ON A COORDINATED CAMPAIGN

To operationalize these shifts on a large-scale coordinated campaign with a scalable budget, we've outlined recommended solutions below. These recommendations should also serve as a guide for smaller campaigns seeking to integrate coalitions and digital under a unified organizing department.

Problem with Old Structure	Recommended Solutions on a Coordinated Campaign
Coalitions department separated from the organizing department	Merge coalitions under the organizing department
	Establish an Impact Program *(see description below)*
	Consider establishing Coalitions Program ROD(s) *(see description below)*
Digital organizing siloed from 'traditional' organizing	Merge digital organizing under the organizing department
	Hire a Digital Tools Manager *(see description below)*
Training teams did not provide adequate management training or ongoing staff development	Hire a Training & Leadership Development Director *(see description below)*

HOW TO ESTABLISH AN IMPACT PROGRAM

An **Impact Program** is a new organizing program that can be managed by an Organizing Department. Its goal is to reach supporters and persuadable voters that the campaign is less likely to reach through traditional voter contact methods. This program is exclusively focused on two key priorities:

- Community Service - serving the communities we are working in and organizing in ways that are specific to the needs of that community.
- Community Building - building relationships with all members of the community through events, engagement, and welcoming office policies.

Through this program, we encourage each region to have 1-2 impact organizers who almost exclusively focus on creating accessible entry points for voters who the campaign may not easily or as effectively activate through phone banking and door-to-door canvassing. This directly influences how impact organizers approach recruitment and the types of events they host. Examples of impact events may include:

- Service events, such as food drives and mutual aid.
- Trainings, such as Know Your Rights, policy, or legal aid trainings.
- Weekly community gatherings, such as community dinners at the office that any voter can attend.

Rather than calling to recruit volunteers for events, impact organizers should utilize tactics like flyering

neighborhoods, high-traffic canvassing at shopping centers, online communities, and community event attendance to publicize and recruit voters we wouldn't otherwise reach.

At these impact events, attendees can be engaged to register to vote, learn more about candidates and issues, reach out to voters in their network, and, in many cases, sign up to volunteer or host their own events. Impact organizers should have meaningful goals they are held accountable to, like any other organizer.

Impact organizers contribute to the region's goals for volunteer recruitment and voter contact, though the primary tactics they use may differ from a turfed organizer based on the region and the events that they are hosting.

As such, this new model achieves both depth and breadth of voter contact for the campaign in a geographic region, and ensures that service and impact work is measurable and held accountable to metric goals.

HOW TO ESTABLISH A COALITIONS PROGRAM REGION

In states and regions with sizable constituency groups defined by shared language or identity, Coordinated Campaigns should consider creating Coalitions Program Regions to ensure deep and culturally competent engagement. These are not regions in the traditional geographic sense; instead, they are designed to reach constituency groups that span multiple geographic regions and turfs. Investing in creating Coalitions Program Regions allows campaigns to engage these key constituencies consistently and intentionally.

Coordinated Campaigns should consider establishing Coalitions Program Regions when a voter group constitutes a meaningful share of the electorate, and meets one of the following criteria:

- Effective engagement requires outreach in a specific language that cannot be consistently delivered through turfed-based organizing alone.
- Distinct organizing tactics and engagement of community institutions are required to mobilize a key constituency.

COALITIONS PROGRAM EXAMPLE #1:
THE AZ COORDINATED CAMPAIGN'S SPANISH PROGRAM

In Arizona, one-third of the electorate is Latino, and half of these voters report speaking Spanish at home. Established first in 2022, the Spanish Program Region allowed the campaign to centralize Spanish-speaking organizing capacity (staff and volunteers) by running large-scale statewide Spanish phonebanks and deploying volunteer capacity in-person strategically across priority districts. It is not realistic to assume every organizer in the geographic regions with high shares of bilingual Latino voters will be able to identify with or speak to this electorate. This model therefore ensured deep engagement of this key constituency statewide.

COALITIONS PROGRAM EXAMPLE #2:
THE ARIZONA COORDINATED CAMPAIGN'S TRIBAL PROGRAM

In Arizona, tribal lands account for over a quarter of the state's total land area and Native voters represent 5%+ of the population. Exclusively using traditional organizing tactics — door-to-door canvassing and phonebanking — fail to reach Native voters effectively. A Tribal Program ensures culturally specific outreach, in partnership with local institutions, is effective at mobilizing Native voters.

Key Responsibilities of a Training & Leadership Development Director

Coordinated Campaigns need dedicated, full-time staff who are responsible for developing the leadership and skills of organizing teams throughout the cycle, not just during their initial onboarding and at GOTV Training. This role expands the responsibilities of a Training Department to explicitly include manager training and ongoing professional development. This work is crucial considering many staffers are managing staff, or managing managers, for the very first time. This work can certainly be supplemented by external coaching, while ensuring there is dedicated staff providing a consistent baseline of staff development on the organizing team.

The Training & Leadership Development Director will be responsible for:

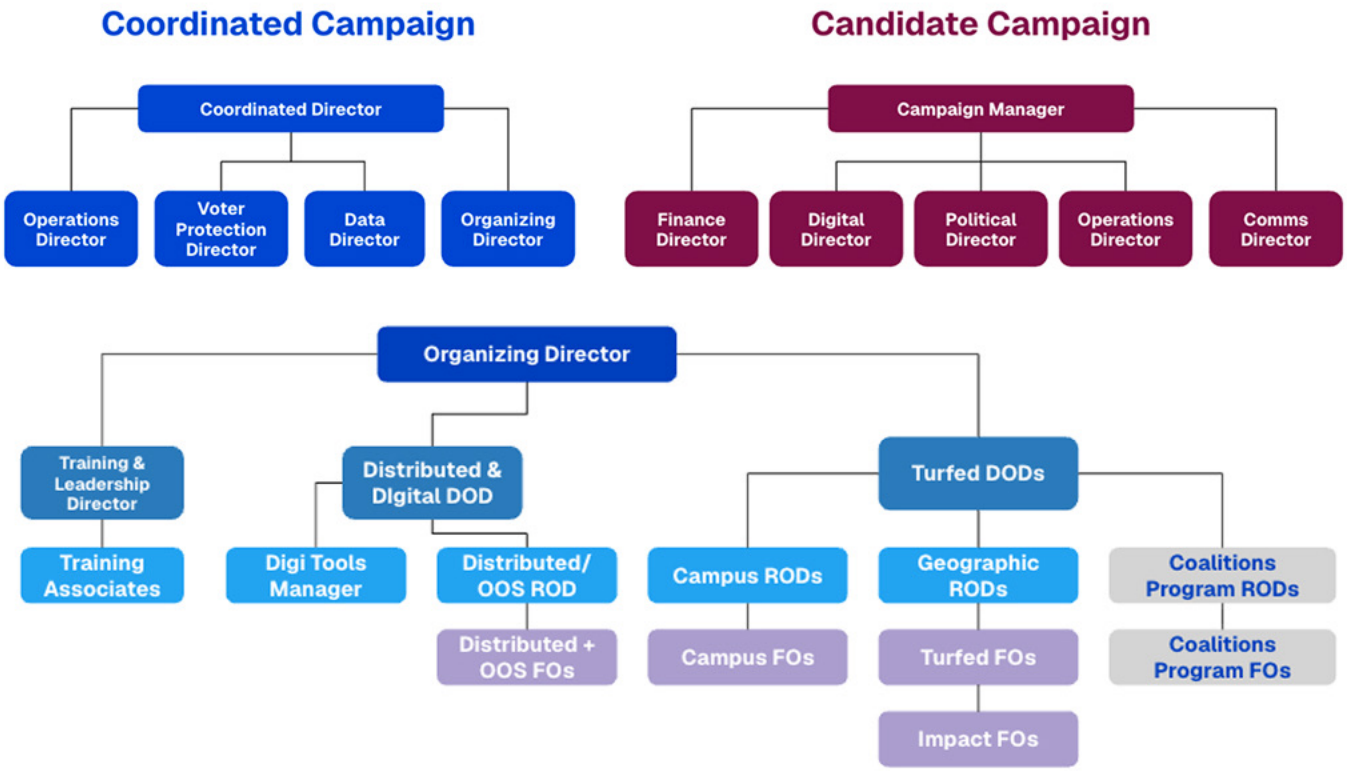
- Developing and leading organizing staff onboardings and recurring skills development training for organizers and managers across program phases.
- Creating and facilitating training materials for volunteers and leadership.
- Designing and facilitating management training for multiple levels of managers, many of whom are in their leadership roles for the first time. This position could provide leadership training exclusively for the organizing department or for additional departments as well, depending on the campaign size.

Key Responsibilities of a Digital Tools Manager

To fully integrate digital organizing under the organizing department, hire a Digital Tools Manager. This staffer will be responsible for:

- Serving as a liaison between the coordinated and candidate campaigns and state party Digital staff, to ensure that digital content from organizers/supporters about the campaign is being uplifted on candidate/party channels and to ensure organizers and supporters can amplify the candidate's content.
- Managing the in-state texting tool (and other digital communications tools) for the large-scale recruitment text sends (to build for major rallies with surrogates, for example). For the most part, organizers should be texting volunteers directly themselves to establish that relationship and to ensure volunteers save their number in their phone.
- Providing digital toolkits and digital organizing best practices for staff and volunteers, who should be trained and asked to post original content consistently about their engagement with the campaign.
- Creating graphics for major statewide initiatives, such as Weekends of Action.

SAMPLE COORDINATED CAMPAIGN STRUCTURE



ORGANIZING RE-MODEL RECAP

1 PRIORITIZE CONNECTION OVER CONTACT

Our collective focus on output has created an illusion of progress. Future success depends on shifting away from transactional interactions to deep, empathetic connections where voters feel understood by the campaign.

2 MODERNIZE OUR TACTICS

Face-to-face conversations remain our most valuable organizing tool. As contact rates decline on the phones and doors, campaigns must supplement with expansion tactics (high-traffic canvassing, community service events, etc.) to maximize the number of conversations it has with voters it may otherwise miss.

3 SHIFT FROM “IDs” TO “INSIGHTS”

Rather than judging the success of a conversation as the collection of an ID, the goal of every conversation should be to gain insight. This requires a "Listen First, ID After" approach, where organizers and volunteers use curiosity, deep listening and personal stories to understand a voter's values and concerns before asking for their vote.

4 IMPLEMENT “LAYERING”

Developing sustained relationships with voters is just as important as the relationships campaigns build with volunteers. Every interaction with a voter should trigger a future follow-up — a process called "layering" — to move voters along a structured ladder of engagement toward turnout.

5 INTEGRATE DIGITAL, COALITIONS, IMPACT, & LEADERSHIP DEVELOPMENT

Organizing programs must treat digital organizing and coalition building as core functions of the organizing department rather than as separate teams. This includes making the campaign accessible to all voters by establishing "Impact Programs" focused on community care and resource distribution. All campaigns should invest in management training and ongoing staff development for their teams.

2

COMMUNITY POWER FINDINGS

COMMUNITY POWER FELLOWSHIP SUMMARY LEARNINGS

OVERVIEW

The DNC launched the **Community Power Fellowship** to invest in rebuilding trust with the voters and communities where we lost ground in 2024. In 2025, the DNC opened a call for experienced organizers from across the ecosystem — both the campaign "hard side" and movement "soft side" — who have successfully organized these communities at the local level. These organizers have a proven track record of developing effective strategies to build lasting connections with diverse groups of voters.

The inaugural Fellowship centers these voices: the organizers, community leaders, and coalition builders who have demonstrated success within their own communities. To start, we convened 39 community organizers across six specialized cohorts — **AANHPI, Black, Latino, Native, Workers, and Youth** — with experience across the following organizations:

COMMUNITY POWER PARTICIPANTS

Participants were affiliated with the following organizations:



OUR PROCESS

Across two intensive, six-hour sessions, these fellows worked to bridge the gap between national strategy and the work happening from organizers on the ground by:

- **SURFACING DIVERSE COMMUNITIES' EXPERIENCES** in the current political and campaign landscape.
- **IDENTIFYING SPECIFIC MOTIVATIONS AND BARRIERS** to civic participation and partisan engagement.
- **DEVELOPING ORGANIZING APPROACHES** rooted in cultural competency and trust.

Each cohort has generated practical guidance designed to support organizers who may be engaging with these communities for the first time. **Think of these recommendations as a compass rather than a rigid map — they are meant to guide your approach, not serve as the final word on tactics. Likewise, no community is a monolith – not every insight, best practice or recommendation will be relevant to every community.**

Below, you will find:

1. **A SUMMARY OF INSIGHTS** that we heard directly from organizers in each community.
2. **A SUMMARY OF BEST PRACTICE RECOMMENDATIONS** to strengthen your outreach.
3. **CASE STUDIES** documenting the on-the-ground work of organizers in state.

Asian American, Native Hawaiian, Pacific Islander (AANHPI) Communities Summary Memo

COHORT PARTICIPANT HIGHLIGHT - MARY PHAM (CALIFORNIA):



Mary was born and raised in Grand Rapids, MI. She became politically involved after attending UC Davis. She's the Organizing Director for Swifties for Hope (formerly Swifties for Kamala) and the Deputy Organizing Director for Every Vote Matters. She resides in the SF Bay Area with her husband and her dog, California.

RECENT ELECTORAL TRENDS

2024 vs 2020:

- 2024: Democrats won AANHPI voters 57% - 40%. [1]
- 2020: Democrats won AANHPI voters roughly 70% - 30%. [2]

Electoral Shifts:

- Republican support among AANHPI voters increased from roughly 30% in 2020 to 40% in 2024.[3]
- That said, this shift was not uniform across the AANHPI community: the decrease in Democratic support was most salient among voters ages 30-44, as well as among Chinese American voters and Independent voters.[4]
- Vietnamese Americans are the only major AANHPI subgroup where a majority identify as Republican or lean Republican. (51%). [5]

Where Democrats Made Progress in 2025:

- Exit polls from the 2025 New Jersey governor's race showed AANHPI voters backed Democrat Mikie Sherrill 82% to 18%.[6]
  - 31% of AANHPI voters who identified as Republican voted for Sherrill for Governor.[7]
- In California, Proposition 50 passed with 63.8% statewide support; counties with high AANHPI populations delivered some of the highest margins in the state, such as Alameda with 80.6% support.[8]

1 https://www.washingtonpost.com/politics/2025/06/26/trump-harris-non-white-voters-pew-survey/

2 https://www.washingtonpost.com/politics/2025/06/26/trump-harris-non-white-voters-pew-survey/

3 https://www.washingtonpost.com/politics/2025/06/26/trump-harris-non-white-voters-pew-survey/

4 https://www.myasianvoice.com/the-asian-american-vote-in-the-2024-presidential-election

5 https://www.pewresearch.org/short-reads/2023/05/25/asian-voters-in-the-u-s-tend-to-be-democratic-but-vietnamese-american-voters-are-an-exception/

6 https://aapinewjersey.org/2025-nj-election-exit-poll-results

7 https://aapinewjersey.org/2025-nj-election-exit-poll-results

8 https://apps.npr.org/2025-election-results/california.html?section=l

AANHPI Community Cohort Learnings

What We Heard from Cohort Participants:

- **Diversity of Communities:** Organizing under a single umbrella ignores differences between ethnic groups, languages, and political experiences.
    - *"Trying to lump everybody together in one box is not working… there's so many different ways to get to the heart of people's decision making."*

- **Economy as Top Priority:** Like other communities, AANHPI voters are focused on getting food on the table, paying rent, and making ends meet.
    - *"It's about base needs right now. Like, getting food on the table, getting shelter... so when we walk in and we're like, will you sign this petition..they're gonna be like... I'm just trying to work so that I can live check-to-check right now."*

- **Political Taboos:** Some AANHPI communities, especially older immigrants, find it uncomfortable or impolite to discuss politics openly.
    - *"I realize a lot of my conversations tend to start apolitically.... they are not really open to having their minds changed, but what I have noticed is that they're open to prolonged and engaging discussion about what they actually believe in."*

- **Representation Matters:** AANHPI voters are significantly underrepresented in elected positions: AANHPI people represent 6.1% of the US population, but hold only ~.09% of federal elected offices.[1] Organizers noted that as they see Republicans run more AANHPI candidates than they have in the past, Democrats must work to communicate democratic values and policies that align with the priorities of the AANHPI community.
    - *"There are a lot of South Asians who are running as Republicans.... When I was canvassing... we often did get a lot of questions. It's like, 'oh, you guys are an Asian American organization, why aren't you supporting the Asian American?'"*

What Participants Recommend:

- **Prioritize In-Language Engagement:** Prioritize outreach that is led by community members, utilizing relational tools like postcards to make participation accessible.
    - Language access means having community members create materials in their own voice, not just translating pre-written English content.

[1] https://www.axios.com/2021/05/04/aapi-representation-elected-officials-leaders

    - **From the Field 📋:** In a 2025 congressional special election cycle, organizers saw a 12% increase in AANHPI voter turnout by having community members write postcards in their own languages at postcard parties in churches, mosques, and community spaces.

- **Be Precise and Local**: Identify the different communities within the AANHPI umbrella that exist in your state, district, or turf, and make a plan on how to engage each independently.
    - Tag specific ethnic communities in VAN beyond the generic 'AANHPI' label
    - Work through community-specific cultural centers in population-dense areas
    - Don't lump Middle Eastern/North African communities under 'AANHPI' by default

- **Manage Community Media:** Control the narrative by building year-round relationships with AANHPI media and placing messaging in high-traffic community spaces.
    - Correct misinformation in other languages, not just English media.
    - **Pro Tip 💡**: Place ads in Asian grocery stores where you can on screens or in weekly coupon books.

- **Community Center/Leader Partnerships:** In population dense areas, partner with leaders and organizations of community-specific cultural centers.
    - Organizations could include Vietnamese community centers, Chinese cultural centers, Korean churches, Filipino organizations, and many more.
    - **From the Field 📋:** When building out your budget and coalitions staff footprint, consider funding community leaders part-time to host round-tables and help your candidate/campaign build trust with specific ethnic groups. One organizer's campaign paid 6 local community leaders 5/hours per week instead of hiring just one coalition staffer dedicated to AANHPI organizing.

- **Participate in Culture:** Show up year round for specific cultural moments and traditions. AANHPI communities notice when campaigns make the effort to participate.
    - Hire local vendors and AANHPI owned business to cater local organizing and volunteer events.
    - **Pro Tip 💡**: Get the details right: say 'Happy Lunar New Year' not 'Happy Chinese New Year.' AANHPI communities notice when you care about specificity.

Black Communities Summary Memo

COHORT PARTICIPANT HIGHLIGHT - BRENTEN SIMS (VIRGINIA):



Brenten Sims is a community advocate, storyteller, and creative who uses his work to bring people together and highlight real stories from the community. Through programs like Black Men Heal Yoga, he creates spaces focused on healing, connection, and support. Brenten's work centers on showing up for people, uplifting community voices, and building programs that help communities feel seen, valued, and connected.

RECENT ELECTORAL TRENDS

2024 vs 2020:

- 2024: Black voters backed Democrats 86% – 13%.[9]
- 2020: Black voters backed Democrats 87% – 12%.[10]

Electoral Shifts:

- While Black voters still overwhelmingly vote for Democrats, Democratic support declined modestly between 2020 and 2024. [11]
- The most notable shift occurred among Black men, where Trump increased his support from roughly 19% in 2020 to around 21% in 2024. [13]
- Black women remain one of the Democratic Party's strongest constituencies; in 2024, 9 in 10 Black women continued to support Democrats.[14]

Where Democrats Made Progress in 2025:

- Exit polling from the 2025 New Jersey governor's race showed Black voters backed Democrat Mikie Sherrill by roughly 9 in 10 votes, maintaining the party's dominant support within the community.[15]
- Similarly, in the 2025 Virginia governor's race, Black voters overwhelmingly supported Democrat Abigail Spanberger, continuing a long-standing trend of strong Democratic alignment in statewide elections.[16]

11 https://www.cnn.com/election/2024/exit-polls/national-results/general/president/0

12 https://www.cnn.com/election/2020/exit-polls/president/national-results

13 https://www.washingtonpost.com/opinions/2025/09/24/trump-black-voters-election-republicans/

14 https://www.washingtonpost.com/opinions/2025/09/24/trump-black-voters-election-republicans/

15 https://www.washingtonpost.com/opinions/2025/09/24/trump-black-voters-election-republicans/

https://www.washingtonpost.com/politics/2025/11/04/democrats-election-wins-trump

https://www.washingtonpost.com/politics/2025/11/04/democrats-election-wins-trump

Black Community Cohort Learnings

What We Heard from Cohort Participants:

- **Historical and Personal:** Black communities carry generations of organizing knowledge passed down from abolitionist movements through Civil Rights to contemporary mutual aid networks. This history shapes how people understand their role in collective action today.
    - *"Our community's been at this for a long time, fighting really hard in a lot of different ways.... This has been generations of work."*

- **Backsliding Progress:** Watching progress that took generations to achieve be reversed creates big questions about whether engagement in electoral campaigns is worth it.
    - *"If one election can change everything that my granny and them were fighting for, then... what are we doing?"*

- **Guardedness and Distrust:** Black voters feel taken for granted and wary of having their stories co-opted for campaigns' self-interest.
    - *"[I] converse with a lot of white people who are [running] other organizations that are... inviting Black folks in to hear their story, hear their struggles, and then being like,* 'thank you for your story, we'll take it from here.' *As if they know what to do, as if they're more prepared to handle the efforts, and that's not okay."*

- **Community Power:** Black communities want to know their participation builds power for their own communities and trust themselves to do that best.
    - *"Sometimes people feel like they don't know if they're actually going to something that'll help them build power, or if they're just kind of helping build someone else's story that won't help them out, or their community out."*
    - *"Who do Black people trust? ... We do trust each other, right? There's a lot of points of distrust, but we trust each other.... We trust people that have historically been in the community and who have a traditional way of doing things. They do the same thing over and over again, it's consistent."*

What Participants Recommend:

- **Earn Black Votes:** Don't assume Black voters will automatically support Democratic candidates. Organizers noted that the Black community increasingly feels taken for granted, reinforcing the need for campaigns to engage Black voters intentionally and early.

    - **Pro Tip 💡:** Ensure a meaningful percentage of Black voters are integrated into your persuasion and early engagement strategies, not just your turn out universe.

- **Develop Leadership Pipelines:** Prioritize hiring Black organizers and value lived experience as a meaningful credential. Too often, campaigns prioritize hiring people of color in junior positions, but don't prioritize diversity in leadership hiring.
    - Offer career development that allows talented organizers to advance.
    - **Pro Tip 💡**: Recruit organizing staff through trusted community networks — local advocacy groups, HBCU alumni organizations, faith communities, and historically Black civic institutions — rather than relying solely on traditional campaign hiring pipelines.

- **Cultivate Shared Success:** Build genuine relationships with people and leaders, to develop shared investment. When a volunteer sees that an organizer is genuinely there to help the community in concrete ways, they show up not only for the cause, but because they want to see their organizer succeed.
    - **Pro Tip 💡:** *"Be honest when things are hard. Black communities have seen enough fake optimism from campaigns. When organizers share genuine challenges, people often step up to problem-solve together."*

- **Honor Expertise, Elders, and Traditions:** Give Black communities the deference expert organizers are due and respect community norms.
    - Instead of saying, "The campaign needs you to knock doors," try, "I'm trying to reach this goal and I need your wisdom on how to get there."
    - When someone offers you a plate, receive it with gratitude. Let people encourage you, pray for you, or just listen.
    - Respect for elders (especially faith leaders) is nonnegotiable, and they are key messengers in their communities.

- **Invest in Collective Care:** Move beyond transactional politics by supporting the Black Church's existing role as a social safety net and create spaces for emotional connection in addition to politics.
    - **From the Field 📋:** *Win with Black Women's* calls included crying, praying, and shared emotional moments that felt powerful because Black women all over the country were experiencing it together.
    - Show up to support existing community service efforts (transportation, emergency assistance, food distribution, and social services).

Latino Communities Summary Memo

COHORT PARTICIPANT HIGHLIGHT - SIERRA HERNANDEZ (NEVADA):



Raised in a working-class, immigrant household, Sierra turned early struggles into strengths, leading with empathy and a deep commitment to ensuring people from all backgrounds feel supported. Having managed campaigns and led statewide digital engagement strategies across Nevada, they're well aware of the challenges Democrats face and the work that needs to be done. They might not be battle-born, but they sure are battle-tested.

RECENT ELECTORAL TRENDS

2024 vs 2020:

- 2024: Latino voters backed Harris 51% - 48% over Trump. [1]
- 2020: Latino voters backed Biden 61% - 36% over Trump. [2]

Electoral Shifts:

- Democrats' advantage with Latino voters dropped sharply, from Biden +25 in 2020 to Harris +3 in 2024. [3]
- Among Latino men, Trump rose from 39% in 2020 to 50% in 2024. Among Latina women, support for Trump rose from 33% in 2020 to 46% in 2024. [4]

Where Democrats Made Progress in 2025:

- Exit polling in the 2025 New Jersey governor's race showed Latino voters backed Democrat Mikie Sherrill 68% - 31%.[5]
- In Virginia's 2025 governor's race, Latino voters backed Democrat Abigail Spanberger 67% - 32%, and 77% of Latino voters said Trump administration immigration actions had "gone too far." [6]

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https://www.pewresearch.org/politics/2025/06/26/voting-patterns-in-the-2024-election/
https://www.pewresearch.org/politics/2025/06/26/voting-patterns-in-the-2024-election/
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https://americasvoice.org/press_releases/key-immigration-latino-findings-from-2025-exit-polls/
https://www.theguardian.com/us-news/2025/nov/08/latino-vote-midterms-democrats-trump

Latino Community Cohort Learnings

What We Heard from Cohort Participants:

- **Expansive Diversity:** Latino voters have tremendous geographic and linguistic diversity — spanning dozens of countries, and have varying levels of fluency in Spanish. One-size-fits-all strategies fail to respect this diversity and engage voters effectively.
    - *"We're not a monolith. You can't just say 'the Latino community' and think one message works for everyone. What matters to someone whose family has been here for generations is different from someone who just got here."*

- **Multi-Issue Voters:** Politicians cannot assume that Latino voters are one-issue voters, and that immigration is the *only* issue they care about. Latino voters care just as much about affordability and health care as anyone else.
    - *"People are working two, three jobs and still can't afford rent. That's what they care about. That's what we need to talk about."*

- **Family-Oriented Identity:** Many Latino voters are children of immigrants or immigrants themselves; these familial histories of migration and sacrifice shape their political perspectives.
    - *"When I turned eighteen and went to vote for the first time, I remember having this feeling on my shoulder. Because my vote became about something a lot bigger than my thoughts and my opinions. It became about my mom. And our family and her sacrifices and our story in this country."*

- **Fragmented Information:** Latino voters overwhelmingly consume content in a mix of English and Spanish on Youtube, TikTok, and WhatsApp — all spaces where misinformation can spread quickly and right-wing voices currently dominate.
    - *"My tía sends me stuff on WhatsApp all the time. Half of it is completely made up, but she believes it because it came from someone she trusts."*
    - *"Turn on Spanish radio — it's all right-wing. All of it. And people believe it because there's no alternative."*

- **Messengers Matter:** Effective organizing in the Latino community requires engaging local, trusted, multilingual validators.
    - *"I don't care what some politician in Washington says. I care what [local organizer] says, because they're here, they know what's happening, and they've helped my family."*

What Participants Recommend:

- **Prioritize Language Access:** Over 40 million people in America speak Spanish at home. Though not all Latinos are fully fluent in Spanish, culturally competent multilingual outreach demonstrates effort and is appreciated. Spanish-language organizing should be an integral organizing strategy from the beginning, with dedicated staff and resources, rather than an afterthought.
    - Ensure you have bilingual materials from the get-go, and invest in hiring or contracting with translators for any bilingual literature or training materials you need to create. Translation is a skill, and should not be an expectation of Latino staff.
    - *"Acknowledge that basic Spanish efforts are appreciated. Many voters recognize and respect when canvassers make genuine attempts... even imperfectly."*
    - **Pro Tip 💡:** Provide basic Spanish-language terminology and cultural context training for all volunteers to ensure they're prepared and reduce avoidance of neighborhoods with higher densities of Spanish-speaking voters.

- **Track Spanish-Speaking Volunteer Capacity:** From the get-go, ask all event attendees and volunteer prospects if they are willing to volunteer in Spanish. This is essential to being able to scale a bilingual volunteer base, and:
    - Incorporate a question asking if volunteers can volunteer in Spanish into every check-in form and volunteer questionnaire.
    - Track Spanish-speaking volunteers with an activist code and/or survey question. This will make it easier to recruit for Spanish-speaking phonebanks and canvasses in Latino-dense precincts.
    - *"There were so many volunteers who had never been asked to volunteer in Spanish, and were so excited to do so. We saw the highest volunteer retention rate among our Spanish-language phonebankers, who felt so purposeful connecting with other Spanish speakers across the state. By the end, we had over 1,000 active Spanish-speaking volunteers."*

- **Run Community-Centered Organizing Programs:** Effective Latino organizing programs should incorporate service-based organizing to help build long-term trust and relationships with Latino voters, especially at a time when there is a heightened fear about ICE in Latino communities.
    - Host multilingual know-your-rights trainings with direct access to attorneys, in partnership with legal aid organizations.
    - Provide tenant rights and consumer advocacy workshops to help voters understand renter protections, access legal support, and connect with partner organizations.

    - **From the Field** 📋: Several organizers described hosting mutual aid events, such as food distribution and neighborhood cleanups, as a way to be visible and show up to earn trust from the Latino community.

- **Partner with Trusted Community Institutions:** Faith leaders, labor unions, local community organizations, and immigrant advocacy groups already play central roles in Latino communities. Partnerships can build credibility for campaigns and candidates.
    - Meet people where they're at — this means not only reaching voters on the doors, but engaging Latino voters in the spaces where they'll already be present: at church, cultural festivals, concerts, and more.
    - On campuses, partner with Latino Greek organizations, cultural clubs, and student groups. Give them voter outreach materials, training, and resources, then let them lead engagement with their members and peers.
    - Work with faith institutions strategically and recognize their growing influence, especially among young Latinos.

- **Build Digital Networks:** Support Latino content creators, amplify community voices on digital channels, and build multilingual WhatsApp groups that can be used to manage large volunteer networks and combat misinformation voters may be hearing.
    - When working with creators and community validators, give them the autonomy to speak in their own voices with their own cultural references.
    - *"Short-form video (TikTok, Instagram Reels...) are where many Latinos... get information. Create content that breaks down issues in accessible, authentic ways".*

Native Communities Summary Memo

COHORT PARTICIPANT HIGHLIGHT - DAVINA SMITH (UTAH):



Davina Smith is a Diné (Navajo) woman from Monument Valley, Utah, and a leader in Indigenous land stewardship, Tribal sovereignty, and community-driven conservation. A citizen of the Navajo Nation, she was appointed by Navajo Nation President Buu Nygren to represent Navajo perspectives on the Bears Ears Inter-Tribal Coalition, where she serves as Co-Chair. Davina is the Founder and CEO of Haseya Native Initiatives, providing culturally grounded consulting that centers Indigenous leadership and landscape-scale protection. She also serves as Chair of the Utah Native Caucus, a Delegate with the San Juan County Utah Democratic Party, and a board member of Bears Ears Partnership and Grand Staircase-Escalante Partners, advancing collaborative conservation across the Colorado Plateau.

RECENT ELECTORAL TRENDS

2024 vs 2020:

- 2024: Native voters backed Harris 57% - 39% over Trump.[1]
- 2020: Surveys found that 60% of Native voters supported Joe Biden.[2]

Electoral Shifts:

- In the 2024 Native-specific survey, Native women backed Harris 63% - 33%, while Native men were much more divided at 50% - 47%.[3]
- Native voters also remained more Democratic down-ballot in 2024: 57% said they voted for the Democratic congressional candidate versus 38% for the Republican.[4]

Where Democrats Made Progress in 2025:

- Native candidates made gains in representation at local levels; 16 indigenous candidates won their seats in 2025 for school board and city council.[5]

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https://www.brookings.edu/articles/the-native-american-vote-in-the-2024-presidential-election/

https://latinodecisions.com/blog/native-americans-overcome-major-obstacles-part-of-voting-coalition-that-led-biden-to-victory

https://2024electionpoll.us/wp-content/uploads/2024/12/2024-AEVP-Fina-NA-Deck.pdf

https://www.brookings.edu/articles/the-native-american-vote-in-the-2024-presidential-election

https://www.underscore.news/justice/contested-elections-local-races-natives-participated-across-the-country-in-2025-elections

Native Community Cohort Learnings

What We Heard from Cohort Participants

- **Tribal Sovereignty:** Reservations are sovereign nations and campaigns must understand tribal governance in order to design their outreach strategies on tribal lands.
    - *"First, start with understanding sovereignty rather than strategy first, because every tribal government system is going to be different...."*
    - *"You gotta get permission from our tribal chairman to even have the press come to our reservation... it's not considered public space."*

- **Diversity of Experience:** The history and culture of each Native tribe is distinct. In states with multiple tribes and reservations, each tribe or reservation should not be treated as a monolith.
    - *"The thing is, that tribes are not all the same across this nation. We are not. That's the perception that we all do things alike, we have our ceremonies the same, we have our connections the same... it's all completely different."*

- **Generational Trauma:** Historical persecution, such as boarding schools and relocation programs, have created a legacy of distrust among Native voters toward federal agencies and elected officials. Skepticism of the federal government is exacerbated by disputes over water rights.
    - *"I'm a boarding school survivor... my parents thought... if I didn't go to boarding school, they would get thrown into jail. That was a generational mindset."*
    - *"25% of that water's river flow belongs to tribes in the form of paper water rights, and we can't pull that water out of the river."*

- **Voter Access Barriers:** On many reservations, there are significant voting barriers, including multi-hour drives to polls, lack of standardized mailing addresses, and mail-in voting restrictions in some states.
    - *"You need gas money. Or, you know, they're telling you, that polling place now is being redirected to another location, you can't vote there... they provide the IDs that you were instructed from the beginning, and then you're turned away."*

What Participants Recommend:

- **Expand Voter Access on Reservations:** Native communities face steep barriers to civic participation.
    - Implement geocoding systems like Google Plus codes on reservations.
    - Coordinate birth certificate and ID assistance programs. Elders born at home, people whose mail goes to another state, families whose validating witnesses have died — these are solvable problems that prevent people from voting.
    - Prepare contingency plans for how to alert Native communities about mail-by-vote restrictions as they happen.
    - **From the Field 📋:** Work to get mobile voting units deployed on reservation land. The Tohono O'odham mobile voting unit, launched by the Pima County Recorder, brings the polling place to voters instead of requiring multi-hour drives. This model is scalable.
    - **From the Field 📋:** some rural and tribal areas lack traditional street addresses. Solve these barriers by using tools like Google Plus Codes to assign coordinates to residences to facilitate targeted voter registration and voter outreach.

- **Understand Tribal Context:** Effective organizing of Native voters begins with a deep understanding of tribal culture and historical relationship with the federal government.
    - Build a one-pager briefing for staff on each tribe in the district: governance structure, key issues, preferred terminology, recent political conflicts, and tribal media outlets.
    - Map tribal lands, service areas, and urban Native populations — many Native voters do not live on reservations.
    - **Pro Tip 💡:** Begin engagement by consulting tribal leaders or designated community representatives about the appropriate way to organize within the community.

- **Prioritize In-Person Engagement on Reservations:** Many Native voters may be geographically spread out and have experienced long histories of political neglect. Showing up in person demonstrates meaningful commitment and effort.
    - Hire organizers from within the reservation, if possible; having someone who is already embedded in a reservation's community is immensely valuable given how challenging it can be for a new person to break through.
    - Conduct roundtables. This is relatively new in Native communities and effective. It gives individual constituents — not just tribal council — direct access to candidates.
    - **From the Field 📋:** Organizers noted that candidates who traveled long distances to visit reservations earned significant goodwill.

- **Partner with Local Institutions and Validators:** Leverage organizations and leaders already working to engage Native communities, both on and off reservations.
    - Develop a list of Native-led organizations that you would like to make relationships with before you need them, and work to build those relationships as a priority.
    - Design and execute a Tribal media strategy that includes outreach to tribal radio stations and newspapers.
    - Hire locally for media production: Campaign ads and content made by people who have never visited the communities they're targeting do not land. This can be solved by hiring Native filmmakers, writers, and designers from the communities themselves.

- **Connect Priority Policy Issues to Daily Life:** There are several policy issues that are particularly salient for Native voters, such as the impact of climate change and tariffs. Campaigns need to put forth specific, tangible plans to address these issues.
    - *"Water rights is a huge thing for us, and is going to become a major issue in this election, even beyond the Southwest"*
    - Illustrate how tariffs impact Native communities — such as the rising costs of car parts that will have a high impact on Native communities on reservations who often drive long distances and work on their own cars.
    - Compare policy impacts to familiar local benchmarks, such as distance to the nearest hospital, cost of propane, and the time it takes to get to the closest grocery store.
    - **From the Field 📋:** In the Southwest, make water rights and extreme heat campaign issues by tying together rising utility bills, access to A/C, and IRA funding cuts.

Working Communities Summary Memo

COHORT HIGHLIGHT - BRIONA PARKINSON (ARIZONA):



Briona Parkinson is the Political & Legislative Director for AFSCME Arizona and Chair of the Maricopa Area Labor Federation, specializing in strategic advocacy and executive governance. A veteran of high-stakes political strategy, Briona cemented her reputation for driving large-scale results by leading Arizona's largest labor electoral program as the 2024 AFL-CIO Campaign Manager. Her leadership extends to critical policy initiatives, including her recent tenure on the Governor's Heat Safety Taskforce, where she helped finalize statewide recommendations. A graduate of the Harvard State and Local Executive Leaders program, as well as the Leading for Change and Monzón Fellowships, Briona combines sophisticated oversight with a commitment to inclusive governance. She operates on the fundamental belief that the most enduring solutions are found through collective action: YOU + ME = WE.

RECENT ELECTORAL TRENDS

2024 vs 2020:

- 2024: Voters without a college degree backed Trump 56% - 43% over Harris.1
- 2020: Voters with some college or less backed Trump 50% - 48% over Biden. 2

Electoral Shifts:

- White voters without a college degree remained one of Trump's strongest groups in 2024, with about two-thirds backing him at roughly the same level as 2020.9, 10
- The broader non-college electorate moved noticeably right between 2020 and 2024, from Trump +2 to Trump +14.1

Where Democrats Made Progress in 2025:

- In the 2025 Virginia and New Jersey gubernatorial races, working class voters shifted back toward Democrats after leaning Republican in both 2021 and 2024. That movement was driven especially by nonwhite working class voters without college degrees and voters making less than $100,000 a year.
- Voters who said the economy was their top issue backed the Democratic gubernatorial candidates by 63% in Virginia and 66% in New Jersey, suggesting Democrats regained some traction with working voters on an economic message.

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https://www.washingtonpost.com/elections/interactive/2024/exit-polls-2024-election/

https://www.washingtonpost.com/elections/interactive/2020/exit-polls/presidential-election-exit-polls/

https://www.americanprogress.org/article/working-class-voters-shifted-slightly-toward-democrats-in-the-2025-gubernatorial-elections/

https://www.americanprogress.org/article/working-class-voters-shifted-slightly-toward-democrats-in-the-2025-gubernatorial-elections

Working Communities Cohort Learnings

What We Heard from Cohort Participants:

- **The Survival Gap:** Many working class families are making decisions day by day, sometimes hour by hour: whether to pay for rent or their medication, whether they need to pick up another job if their hours are cut.
    - *"We are in survival mode, and that has to be understood and accepted as what it is right now, that's not changing. And so when campaigns either feel like they're shouting at us to get involved… or when they're only talking about things that are multiple years in the making, it's hard to want to participate."*

- **Communication Deficit:** Even when policy wins occur, they are rarely communicated in spaces that actually reach working people. And if voters don't see the benefit of policy actions in their everyday lives, the party won't get credit.
    - *"It (The Bipartisan Infrastructure Law) never got broken down into, 'hey, that project down the road, that's what you're working on, that's where this came from, we need more of this.' We never bring it back to what actually hits home with our members, or what hits home with our communities."*

- **Time Scarcity:** Hourly workers view free time as highly valuable. Time away from the job site means a direct loss of income, making traditional campaign events a potential burden.
    - *"If I'm off of work, I don't get paid, that's it. And so, if I'm not on the job site, I'm not getting a paycheck. And so, it's very hard for working class families to go to multiple different things."*

- **Pride and Identity:** Union workers take deep pride in their work; for many, their union affiliation and job are integral to their identity.
    - *"I am an ironworker, that becomes my persona, right? … I'm proud that our party is led by somebody who came from labor. Like, that's, we don't talk about that enough, I don't think."*

- **Transactional Politics:** For working families living paycheck to paycheck, politics is increasingly viewed through the lens of immediate benefit ("What are you doing for my family right now?") rather than static party identification.
    - *"I constantly hear at every single one of our membership meetings, 'well, you guys are just all vote blue no matter who.' And it's, no… these are the issues. Find us somebody who comes from a different background, and if they will stand next to us on the platform representing labor, we'll have a conversation with them."*

What Participants Recommend:

- **Go Where Organizing is Already Happening:** Strengthening union support and labor relationships can help rebuild trust with working communities. These organizations remain a key bridge to working-class voters.
    - Embed organizing into the events and spaces where union workers are spending the majority of their day. Union halls, break rooms, apprenticeship classes, and job sites are where political conversations naturally happen.
    - Pro Tip 💡: Organizers and candidates should attend apprenticeship classes — these rooms are full of potential voters in a structured setting.

- **Activate Validators:** Working class voters are most likely to listen to people who share their experience. Hire organizers from the actual neighborhoods or industries you're targeting so they already know local gathering spots and social norms.
    - Send messengers into places they're already familiar with and let them have normal conversations rather than scripted pitches from surrogates.

- **Treat Distrust as Rational:** Build trust by accepting skepticism. Open with lived-experience questions, not political ones. ("What's been hardest this year?" "What costs are hitting you most?").
    - Validate feelings before offering any policy or candidate framing.
    - Repeat back what you heard ("So overtime cuts have been the biggest hit?").
    - Log personal context notes so future follow-ups feel more personal.

- **Translate to Tangible Impacts:** Connect legislation and policy proposals to local context.
    - Make policy tangible. Don't say "infrastructure investment" — say "that highway project your neighbor is working on exists because of this law."

- **Make Campaigns & Offices Accessible**: Build belonging by meeting workers in familiar spaces, using plain language, offering food when possible, and elevating working-class leaders as visible captains and messengers. Design volunteer shifts around short windows of time or tasks that can be completed flexibly.
    - **Pro Tip** 💡: Maybe someone has windows of time to knock 75 doors over the course of the week. Consider giving them a turf to knock and having them knock at times that work for them. After, evaluate on a per-person basis if it was effective and adapt.
    - **From the Field** 📋**:** One Michigan Senate candidate held a statewide microbrewery tour, hosting informal conversations at local gathering places where people were already congregating. By meeting voters in familiar spaces where they already spend time, the campaign created accessible touchpoints

for working people to engage with them without having to ask voters to travel to a new location to attend a traditional town hall.

- **Be a Straight Shooter:** Avoid spin, hedging, or overly polished language. Acknowledge tradeoffs, admit uncertainty, and speak in concrete terms to show respect.
    - **Pro Tip 💡:** Test your messaging with a working-class volunteer advisory board before deploying it. What sounds powerful in a campaign office may sound cloudy and abstract in a break room.

Young Voters Summary Memo

COHORT HIGHLIGHT - JONNIKA KWON (WASHINGTON DC):



Jonnika Kwon began her organizing work through the High School Democrats of America, where she served as Chair of the Washington State High School Democrats. In this role, her focus was on connecting young people with campaigns, increasing youth voter turnout, and bridging the gap between Democratic party leadership and youth communities. She is currently a freshman at Georgetown University and an intern for the Democratic Municipal Officials, where she is working on developing a national Youth Engagement Toolkit to help candidates increase their outreach and engagement with high school and college students.

RECENT ELECTORAL TRENDS

2024 vs 2020:

- 2024: Voters ages 18-29 backed Harris 54% - 43% over Trump.9
- 2020: Voters ages 18-29 backed Biden 60% - 36% over Trump.10

Electoral Shifts:

- Democrats' margin with young voters fell from Biden +24 in 2020 to Harris +11 in 2024.9, 10
- Trump's gains among young men were especially striking: CNN's exit-poll discussion noted men under 30 moved from backing Biden by 15 points in 2020 to backing Trump by 13 points in 2024.

Where Democrats Made Progress in 2025:

- In New York City's 2025 mayoral race, about three-quarters of voters under 30 backed Democrat Zohran Mamdani.
- In Virginia, young voter turnout increased by 7% from 2021. In New Jersey, young voter turnout increased by 9% compared to the 2021 gubernatorial elections. According to exit polls, 70% of youth backed Democrat Abigail Spanberger and 69% supported Democrat Mikie Sherrill in New Jersey

https://www.newsweek.com/donald-trump-approval-rating-young-men-changed-11285979
https://apnews.com/article/poll-election-2025-demographics-voters-latino-black-b59518a2c8d2f37f857fe1ac32995b9a
https://circle.tufts.edu/latest-research/young-voters-power-mamdani-victory-shape-key-2025-elections

Youth Community Cohort Learnings

What We Heard from Cohort Participants:

- **Echo Chambers Online:** Social media algorithms have replaced many real world experiences, with curated feeds designed to reinforce existing beliefs. This makes in-person interaction, where people encounter different perspectives, exceptionally valuable for organizing.
    - *"...you see something on the internet and you think that's... the whole picture. But when you're, like, actually in that... in [in-person institutions], like, you're talking to people who have a completely different 'For You' page... and showing people perspectives that they never would have been exposed to, because their phone is just going to show them more of the same."*

- **Economic Hopelessness:** Young voters' political engagement is driven by an evaporating entry-level job market, the exorbitant cost of rent, and crushing student debt. Young voters don't expect to do better financially than their parents.
    - *"The entry-level career market is so bad right now. I know a lot of seniors [in college] who are struggling to find jobs."*

- **Radar for Authenticity:** As social media natives, young people have a hyper-sensitive radar for "cringe", untrustworthy content. Even when executed well, being online isn't enough to breakthrough or inspire action.
    - *"I really feel like social media is that, like, first step, it's that recognition, but it doesn't necessarily mean that's... that's who you're gonna believe in."*

- **Gender Divergence:** Algorithms are sorting young men and women into increasingly separate and often opposing political realities, with young men specifically targeted by a sophisticated right-wing media ecosystem that offers them explanations for their economic anxiety, social isolation, and perceived loss of status.
    - *"I went to an all-girls school.... I think we had one Trump supporter in our entire school, like, super, super liberal school.... We had a brother school, and they were, same location, under the same sphere. They were really conservative, and I feel like that just really sums up what's going on with Gen Z right now."*

- **COVID Hangover:** Missing out on key high school or college experiences was devastating for many young people and fundamentally shifted how they communicate.
    - *"For me, I'm 21, so COVID happened for me in 9th grade, so the beginning of high school. And so, I kind of saw the effects of COVID all the way through high school into college. Essentially, at my high school in Alabama.... every*

year of COVID, there was, like, a suicide that happened in high school to, like, a detriment to isolation during that time, 2020."

What Participants Recommend:

- **Value Youth Partners:** Successful organizing treats young people as equal partners with valuable expertise rather than as a source of free labor. Listen to their feedback and source prospects for a youth advisory group/board/team early in the campaign.
    - Pro Tip 💡: Compensate young volunteers giving large amounts of time when possible. If payment is not possible, offer other concrete benefits like service hours, food, stipends, and merch.

- **Be Authentic, Don't Imitate:** A campaign shouldn't adopt slang or mimic online culture just to relate to young people. Engagement works best when it is respectful, direct, and simplifies complex issues — especially for people who aren't steeped in politics. Keep this principle in mind when drafting scripts.
    - Prioritize warmer, more human touchpoints: peer-to-peer introductions, in-person conversations in shared spaces, and opt-in follow-up ("Can I text you the details?").
    - Capitalize on viral moments as locally as possible. When something from the campaign is going viral online, think about how to associate it with on the ground activity.
    - **Pro Tip 💡:** Be responsive to feedback. What constitutes 'cringe' can change quickly. Language from even two months prior may need to evolve.

- **Prioritize Outcomes over Inputs:** Focus on key outcomes — like candidate IDs and voter registrations — over rigid, mandatory input metrics such as call-time goals that frustrate young volunteers. Consider providing organizing staff with a menu of tactics they can use to reach their goals, and allow them the autonomy to choose what works for them, so long as they are meeting their output goals.
    - **Pro Tip 💡:** Design classic campaign activities with young volunteers experience in mind:
        - Redefine one-on-ones to be more flexible. Define some hard-and-fast rules for what should be accomplished in a one-on-one, but don't define the locale or length.
        - Canvassing alone should always be an option, but young people, especially first time volunteers, should be encouraged to feel comfortable going in pairs.

- **Broaden the Scope:** Build issue-based infrastructure that outlasts any single candidate or cycle. "Buckeyes for [Candidate]" is narrow, and disappears after the election. "Buckeyes for Progress" is broadly appealing, and stays across cycles. Offer

the “[X] for Progress” model particularly in areas that lack trust in the Democratic brand.
    - Remember mutual aid is organizing. Organize rapid-response actions around politically salient moments and host community service events to connect with voters we may otherwise not reach.
    - **From the Field 📋:** Organizers hosted “Know Your Ballot” events in commonly used third spaces where young people could learn about propositions and candidates on the ballot, with focus on how they specifically will be affected.

- **Build Youth Exclusive Spaces:** Young voter-oriented organizing should be approachable, comfortable, non-intimidating, and introduce very little new vocabulary to the average participant. Recognize that “going out and having a good time” while talking politics with friends can count as organizing.
    - **Pro Tip 💡:** Instead of holding an event called a ‘friendbank,’ invite people to come hang out and text their friends. Host low-pressure social events alongside higher-effort organizing activities.

3

DNC ORGANIZING TECHNOLOGY PILOTS

2025 Organizing Technology Pilots

As campaigns re-think how organizers engage voters and volunteers, the technology and tools that power them must evolve accordingly. Many of the tools that campaigns rely on today were designed to facilitate and measure the traditional tactics: doors knocked and phone calls made. The technology we use directly informs what metrics we can track, and how we can make that data actionable at scale.

In order to support the organizing re-model outlined in this playbook, campaigns will need tools that enable organizers to leverage an expanded menu of tactics and measure deeper engagement with voters.

In 2025, the DNC launched an Organizing Technology Request for Proposal to identify the tools and technologies that will power the next generation of organizing at the DNC and across the country. In total, we received 51 proposals, and selected four innovative tools to pilot beginning in 2025.

This section outlines the evaluation criteria we used to select these pilots, the key findings and recommendations for each of these tools, and the areas where organizing technology must continue to evolve ahead of 2028.

Jump to section:

Evaluation Criteria and Use Cases
Topline Tool Overview
2026 DNC Recommendation
Tool Overview: Winnable
Tool Overview: OpenField
Tool Overview: Matchbook
Tool Overview: OutOrganize

Evaluation Criteria and Use Cases

Our evaluation process was anchored in a central question: “what are the major organizing technology and measurement problems we need to solve between now and 2028?” We’ve identified six key areas in organizing to prioritize technology interventions to run more efficient, impactful organizing programs moving forward:

Priority Area	Problem	Ideal Outcome
1. Organizer Efficiency & Automating Mundane Tasks	Organizers spend too many hours on manual, repetitive work like data entry and pulling lists.	Organizers spend more time building relationships and less time clicking.
2. Measuring Relational & Digital Organizing	Our current tools make it hard to track and measure the real impact of friend-to-friend and online outreach.	Campaigns can fully integrate and track online and relational outreach effectiveness.
3. Voter Registration	State-specific rules make voter registration technology fragmented and often outdated.	Staff can use flexible technology that adapts to state rules, easily tracking a person from signup to being added to the voter file.
4. Optimizing Traditional Voter Contact Methods	Traditional methods like canvassing and phonebanking need to be more efficient and result in more meaningful conversations.	Volunteers and organizers have more impactful conversations and waste less time dialing non-answers or knocking on empty doors.
5. Analyzing Qualitative Data & Making it Actionable	Rich conversation data from voters and volunteers gets stuck in various tools or lost on paper, making it unusable for personalized follow-up.	Campaigns can quickly understand the key issues voters care about and use that information for personalized follow-up messages.
6. Digital Community Spaces to Engage Volunteers at Scale	Existing volunteer platforms are often hard to use, have high barriers to entry, and aren't optimized for mobilization.	Volunteers can find everything they need in one easy place, and organizers can build a strong sense of community with their remote volunteers.

Topline Tool Overview

In total, the DNC reviewed 51 proposals and selected four innovative tools for a pilot program running from September 2025 through January 2026. These tools addressed solutions for event management, voter outreach, core voter/volunteer data management, and organizer efficiency. Below, you'll find an overview of these tools.

Winnable Events Platform	OpenField Voter Outreach	Matchbook Next Gen CRM	OutOrganize Organizer Task & Volunteer Management
Core Problem Solved Lack of affordable, scalable, easy-to-use event tools for Democrats.	Core Problem Solved Multiple tools needed for different outreach types. Important data falls through the cracks.	Core Problem Solved Siloed data makes it hard to see voters holistically. Data that could drive real time analytics and predictions instead sits idle.	Core Problem Solved Organizer call time is inefficient. Key volunteer info is hard to access quickly.
Key Result Provided an affordable and easy-to-use platform to list and manage organizing events, with high sign-up conversion, and necessary event customization.	Key Result Enables real time voter file matching. Valuable for campus and high traffic canvassing where many contacts are unregistered.	Key Result Users can train models in 30-60 minutes, generating predictions with their existing data. Combines voter, volunteer, and donor data in one database.	Key Result 4 shifts per 10 conversations in OutOrganize, compared to 3 shifts per 10 conversations in other tools.
Best For State parties needing unlimited local accounts for county parties/candidates, and programs prioritizing simple volunteer signups.	Best For Campus organizing, high-traffic canvassing, and areas with transient populations.	Best For Data Directors and state parties that are looking for predictive modeling without hiring outside consultants.	Best For Field organizing teams that are looking for a simple ladder of engagement management and organizer call time management.
Needs/Improvements: Additional CRM integrations for data sync.	Needs/Improvements: More CRM integrations. Admin interface improvements.	Needs/Improvements: Hierarchical permissions.	Needs/Improvements: Calling integrations. Distributed team features.
Contact: info@winnable.app	Contact: sales@openfield.ai	Contact: info@indigo.engineering	Contact: info@outorganize.com

2026 DNC Recommendations

The pilots provided clear data on which tools are effective for specific organizing needs:

- **For Event Management:** Winnable is highly recommended for state parties due to its affordability and sub-account structure, which easily supports county and local partners. The conversion rate increase is a major win. *Note: It will be ready for real-time connection to your voter database (CRM) in Spring 2026.*

- **For High-Traffic Outreach:** If you are looking to run high-traffic canvassing or voter registration canvassing, OpenField excels in environments where you contact many people not yet in the voter file (like college campuses or high-traffic areas). Its ability to instantly match and create new records prevents data loss and makes follow-up possible.

- **For Data and Modeling:** Matchbook is the solution for campaigns looking to combine their voter, volunteer, and donor data into one place for a holistic view. Its key feature is allowing teams to quickly generate their own predictive models.

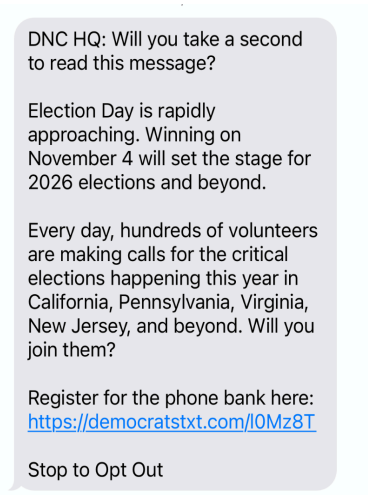
- **For Organizer Efficiency:** OutOrganize is a strong choice for field teams, particularly with new organizers. It significantly improves the efficiency of call time, meaning organizers spend less time on administration and more time recruiting and managing volunteers.

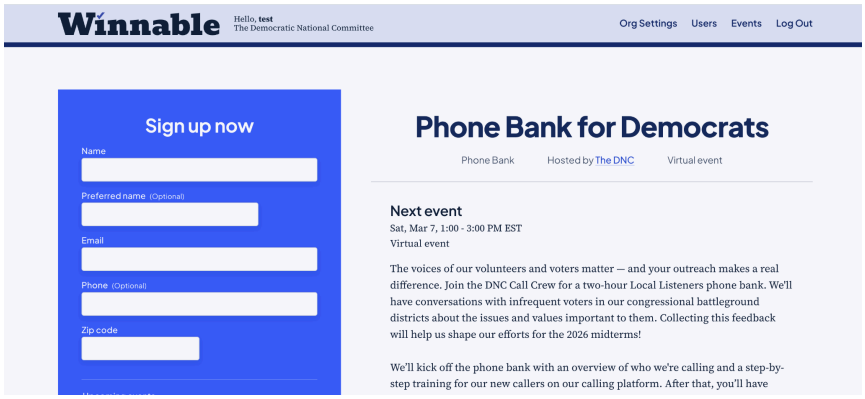
The overarching takeaway is that campaigns should move toward tools that eliminate data silos and automate manual steps, allowing organizers to focus on building meaningful relationships and having high-quality conversations.

Tool Overview: Winnable

Events Platform - Contact: info@winnable.app

What this tool does: Winnable is a web-based platform for creating, managing, and tracking both in-person and virtual campaign events. It is a reliable and affordable option, especially for organizations that need to support multiple county or down-ballot programs with their own sub-accounts.





Key Pilot Results

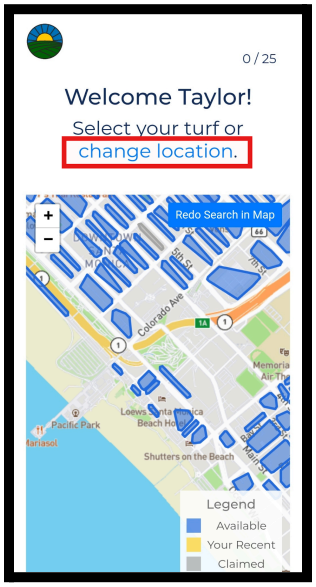
- Conversion Rate Boost: In a national A/B test, Winnable resulted in a 4x higher event signup conversion rate compared to the DNC's existing platform.
- Repeat Engagement: The ability for a volunteer to sign up for multiple shifts from a single link was a major driver of repeat engagement. The pilot saw 28,254 total shift signups from 12,517 unique volunteers.
- Ease of Use: Organizers consistently praised the platform for being intuitive, requiring minimal training, and being easy for non-technical users and volunteer leaders.

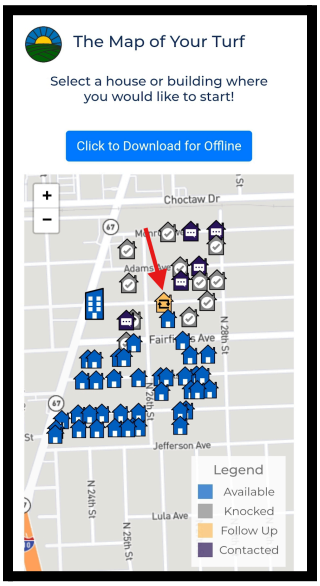
Best Fit	Not a Fit (Yet)
State parties that need an affordable, reliable event tool with built-in support (sub-accounts) for county and down-ballot campaigns.	Campaigns that require real-time connection to your voter database (CRM) for event data.The key limitation of connecting to voter databases is being addressed and this feature will be available in Spring 2026.
Programs that prioritize simple volunteer self-signup and maximizing repeat engagement from volunteers.	Teams that need highly advanced, complex reporting from event data *today*.

Tool Overview: OpenField

Canvassing Tool - Contact: <sales@openfield.ai>

What this tool does:
OpenField is an all-in-one web tool for a variety of outreach methods: door-to-door canvassing, high-traffic event canvassing, phone banking, and other data entry. Its main value is the ability to match voters to the voter file in real-time and capture conversation notes in a single, seamless workflow.





Key Pilot Results:

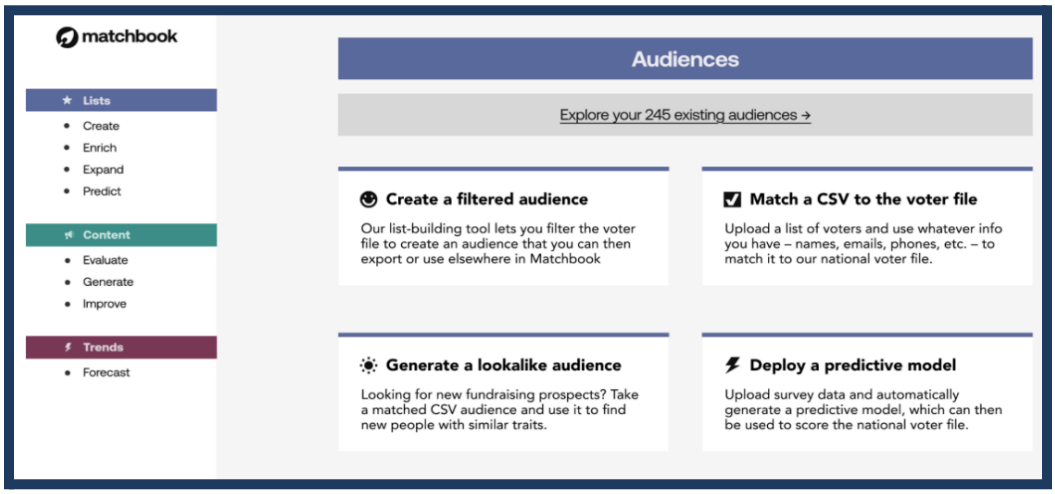
- Best for Flexible Canvassing: OpenField performed best in areas with high-traffic and transient populations (like college campuses), where many contacts are not yet in the voter file.
- Preventing Data Loss: Real-time voter file matching and the ability to create new records instantly prevented data loss. In the Virginia campus pilot, 52% of conversations were with people not registered—all of whom could be added for immediate follow-up.
- Qualitative Notes at Scale: Organizers found it a significant improvement for easily capturing and logging detailed qualitative notes from conversations.
- Low Barrier to Entry: The tool was easy to train and onboard volunteers and new organizers quickly.

Best Fit	Limitation
Teams focused on campus organizing, high-traffic events, and programs in areas with transient populations.	Its net value was more limited in traditional canvassing environments where most contacts are already in the voter file.
Campaigns prioritizing voter registration where a contact might not be in the voter file yet.	Needs more integrations with other voter databases (CRMs).

Tool Overview: Matchbook

NextGen CRM - Contact: info@indigo.engineering

What this tool does: Matchbook is a "Next Generation" Customer Relationship Management (CRM) tool, acting as a single database to combine a campaign's various data sources. It un-silos information to show a holistic view of every voter, volunteer, and donor, and it includes built-in predictive modeling capabilities. This is most valuable for Data Directors who are managing universes, volunteer tiers, saved searches, and modeling.



Key Pilot Results:

- Holistic Data View: Successfully combines voter, volunteer, and donor data into one easy-to-use database, solving the problem of data sitting idle in separate systems.
- Built-in Modeling: Users were able to train predictive models (e.g., who is likely to take action for Democrats) in a short time frame (30–60 minutes) using their existing campaign data. This feature removes the need for outside consultants for basic modeling.

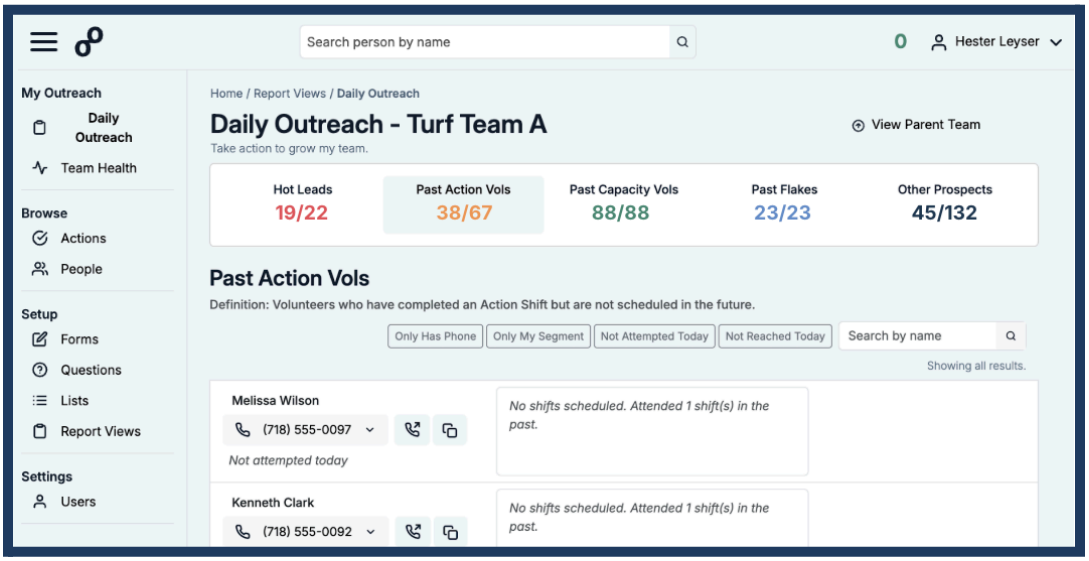
Is This Tool Right for Your Campaign?

Best Fit	Needs/Improvements
Teams looking for a comprehensive, multi-source data matching solution.	Needs more options for hierarchical permissions (limiting what different levels of staff can see/do).
Campaigns that want built-in predictive modeling tools without bringing in outside data consultants.	Needs additional integrations with outreach and event tools.

Tool Overview: OutOrganize

Organizer Task & Volunteer Management - Contact: info@outorganize.com

What this tool is:
OutOrganize is a tool designed to improve the day-to-day efficiency of organizers, primarily focusing on managing volunteer contact tasks, tracking volunteer data, and improving the effectiveness of "call time" (recruitment and scheduling).



Key Pilot Results:

- Organizer Efficiency: The tool significantly improved the effectiveness of call time. Organizers scheduled 30% more shifts per recruitment conversation through OutOrganize, compared to other methods.
- Quick Access to Info: It helps organizers quickly access key volunteer information, which is critical for making better and more personalized requests.

Is This Tool Right for Your Campaign?

Best Fit	Needs/Improvements
Field organizing teams whose staff spends a lot of time on call time and volunteer recruitment.	Calling and texting integrations to reduce reliance on personal phones.
Campaigns looking for a platform that is easy for first-time organizers to onboard and quickly become efficient.	Needs expanded roles and permissions for volunteer leaders and distributed teams.

4

CASE STUDIES

CASE STUDY OVERVIEW

In communities across the country, campaigns and progressive organizations have innovated and adapted their organizing work to meet the moment. These individuals and teams have tested new tactics, solved operational challenges, and built more effective organizing programs. Too often in our industry, promising tactics that are tested in one state are not shared broadly. This section is an effort to capture some of the recent experimentation happening across the progressive ecosystem so that Democratic campaigns, organizers, and partners can learn from each other and continue to evolve how we do this work.

These case studies are not meant to be prescriptive. Every campaign operates in a unique political and geographic context. Instead, they are meant to offer ideas, lessons, and inspiration that campaigns can consider and adapt to their own local context.

The case studies featured in this section were selected because they illustrate three core themes that align with the organizing re-model outlined in this playbook:

1. **Building relationships with and listening to diverse groups of voters, through tactics that reflect how people actually communicate and interact with campaigns today.**
2. **Removing structural barriers to participation, ensuring that more volunteers and voters are able to access and participate in the political process.**
3. **Investing in our talent pipeline, ensuring that all staff and volunteers are prepared for their roles and to have the most impactful conversations with voters.**

PLAYBOOK CASE STUDIES:

ORGANIZING DIVERSE COMMUNITIES

COMMUNITY POWER CASE STUDIES

- 2025 Virginia Campus Organizing Program
- 2023-2025 Reaching Black Voters in Rural New Hampshire
- 2025 Tennessee In-Language Postcard Parties
- 2020 California Bags of Rice Census Outreach
- 2025 Virginia Building Grassroots Leadership through Civic Education
- 2024 Grassroots Sovereignty-Based Organizing
- 2024 Rebuilding Native Political Infrastructure from Scratch

LISTENING TO VOTERS & MAKING INSIGHTS ACTIONABLE

- 2025 Black & Latino Polling in Virginia & New Jersey
- DNC Local Listeners
- Ground Truth Pilot Findings [Swing Left]
- How to Build a Storybank & MicroInfluencer Program [Porchlight]

DEVELOPING TALENT PIPELINES

- 2025 Virginia Hiring & Staff Performance Evaluation Systems
- Building Pathways to Union Careers with Young Nevadans

DIGITAL TOOLS & TACTICS

- Using WhatsApp Channels [Higher Ground Institute]
- Instagram Chatbots [Higher Ground Institute]

INNOVATIONS FROM THE FIELD: COMMUNITY POWER CASE STUDIES

The following case studies were surfaced in the individual Community Power Cohort Sessions. The work represented here was conducted by cohort participants themselves and are being shared as examples of how to apply many of the above best practices in real campaign environments.

COMMUNITY POWER CASE STUDY #1
"CAMPUS DIRECT VOTER CONTACT (DVC) BIG THREE" ORGANIZING PROGRAM (2025)

Work conducted by a participant working for the 2025 VA House Caucus Organizing Team

The 2025 Campus DVC Program was a rapid-response organizing initiative launched across Virginia's colleges that used authentic, relational organizing to scale high-quality engagement even with time and resource constraints. Moving away from traditional "input" metrics like call volume, the program pioneered the "Big Three" model, which redefined volunteerism among young voters through three tangible outcomes: candidate IDs, voter registrations, and voting plans.

WHAT WORKED:

- **Marketing the program to all students.** Instead of only targeting politically-engaged students through organizations like College Democrats, this program appealed to a broader group of students by branding themselves through a "Progress" frame, giving the group freedom from pre-conceived perceptions students might form about a Democratic-first organization.
  - This strategy relied on organizers first engaging students to learn which issues mattered most to them. They then used these student-identified priorities to connect candidates to the campus community and attract interest through relational organizing, high-traffic events, and issue-specific student groups or clubs (e.g., Hokies for Reproductive Freedom).
- **Outcome-based volunteer definitions.** Instead of defining volunteers by the activity they did (like phonebanking or canvassing), this program defined them by the results they achieved. Volunteers were measured using three simple metrics, called **the Campus DVC Big 3:**
  - Candidate IDs – identifying and recording students who support a candidate
  - Voter Registrations – helping students register to vote
  - Voters Who Make a Plan – encouraging students to commit to voting, including when and how they'll do it
- **Lowering the barrier to entry on what it means to be a volunteer.** In this program, even talking to people at a Halloween party about the campaign counted as a shift.
  - "If you completed one of the three actions, you were considered a volunteer. And we gave them a list of ways that they can do this. Like, friend banks, tabling, class raps, social media posts, one-on-ones, high traffic canvassing. The point was "if you do this, you're a volunteer."
- **Having young people post authentically.** Students were encouraged to "[post] in their own voice" and not just via sharing branded content.
- **Prioritizing tactics that were working.** The program didn't push door knocking on campuses where they were meeting resistance or not getting a lot of value. "We found our juice with friend banks." They prioritized tactics that kept students talking to people they knew.

RESULTS:

- Empowered students to organize through their strengths and networks, generating high ownership, faster ramp-up, and stronger volunteer retention throughout the cycle
- Created a culture of creativity and thinking outside of the box — this translated into a highly resilient and adaptable team that corrected issues quickly
- Delivered historic gains in traditionally disengaged campus communities, including a 530% increase in provisional ballots at one university and narrowing an R+7 district to under 250 votes

COMMUNITY POWER CASE STUDY #2
REACHING BLACK VOTERS IN RURAL NEW HAMPSHIRE (2023–2025)
Work conducted by participant leading the NHDP Black Caucus

In the Upper Valley and North Country of New Hampshire, some of the most geographically isolated regions in the state, local organizers and the NHDP Black Caucus launched a pioneering outreach initiative for Black and immigrant residents. Operating in areas where these communities are small and often overlooked, the program moved away from mass persuasion in favor of a trust-based model. By utilizing cultural gatherings and local restaurants as organizing infrastructure, the initiative closed the "political education gap" for first-time and infrequent voters, including Haitian and other immigrant groups. This consistent, year-round presence built a durable bridge between marginalized rural residents and the electoral process, turning one-off transactions into long-term civic participation.

WHAT WORKED:

- **Used trusted community spaces as the organizing infrastructure.** Outreach ran through cultural gatherings, community meetings, local restaurants, and equity coalitions — spaces where people already had relationships and political conversation didn't feel forced.
- **Led with political education and "how it works," explainers, not just asks.** Organizers created room for questions and explained the mechanics of local and state elections for community members unfamiliar with the electoral system.
- **Made language access and cultural translation the central tactic.** This program was not just about translating words — it focused on translating process, norms, and the stakes of an election in culturally fluent ways for Haitian and other immigrants. One-on-one conversations and follow-up organizing replaced transactional scripts, creating a pathway from curiosity to participation.
- **Coordinated with party and campaign field teams without losing trust.** Partnerships with the NHDP Black Caucus and campaign field programs helped connect community members to party efforts without straying from their core concerns.
- **Remained rooted in real concerns.** At these gatherings, organizers let participants guide the conversation to focus on topics that were most relevant and top of mind, whether that be housing stability, immigration enforcement, education, or health care access. Allowing participants to inform the topics of discussion, rather than adhering to a pre-set agenda, made the conversation more engaging and impactful.
- **Showed up beyond election season.** In a small, rural state, effective engagement depended on consistent presence and a willingness to listen more than persuade.

RESULTS:

- Increased engagement among Black and immigrant communities in the Upper Valley and North Country.
- Strengthened trust between community leaders and local Democratic organizers beyond a single cycle.
- Identified persistent participation barriers (language gaps, rural infrastructure limits, weak post-election follow-up) and what it would take to fix them.

COMMUNITY POWER CASE STUDY #3
IN-LANGUAGE POSTCARD PARTIES (TENNESSEE, 2025)

Work conducted by participant working on 2025 TN Special Congressional Election

An organizing initiative for Aftyn Beyn in Tennessee's 2025 congressional special election pioneered a decentralized, in-language postcard model to engage the state's AANHPI voters. Moving away from traditional, top-down mailers, the initiative empowered community members to host "postcard parties" within trusted spaces like churches, mosques, and community centers. By translating campaign messaging into authentic cultural contexts rather than literal scripts, the program lowered barriers for volunteers who were hesitant to door-knock but eager to organize on their home turf. This volunteer-funded infrastructure not only drastically reduced campaign mail costs but also drove an increase in AANHPI turnout, proving the power of self-sustaining, culturally resonant political engagement.

WHAT WORKED:

- **Let community members create messages in their own voice.** Organizers provided a general message, then community leaders translated and adapted it authentically — not a literal translation.
- **Made participation easy and culturally comfortable.** People could participate in familiar spaces and complete an easy task. Community members who felt uncomfortable canvassing found this approachable: "this is something that I can do."
- **Created toolkits for self-sustaining programs.** Once started, community groups ran their own postcard parties independently — organizers would get calls saying "oh yeah, we sent like 2,500 postcards, just so you know."

RESULTS:

- Increased voter turnout among AANHPI communities who received in-language postcards by 12%.
- Self-sustaining model that community groups ran independently
- Significant cost savings on mail budget

COMMUNITY POWER CASE STUDY #4
CENSUS OUTREACH (SAN FRANCISCO, 2020)

Work conducted by participant working for API Council of San Francisco

Every decade, the US Census is conducted to count every person living in the country. The results inform how federal funding is allocated and how legislative districts are drawn. In the lead-up to the 2020 Census, the API Council of San Francisco — a coalition of over 50 local community groups — faced a major challenge: how to reach low-income AANHPI residents who were hesitant to interact with strangers during COVID-19. Many of these residents often also faced language barriers when completing the census. To address this, this coalition paired mutual aid with census assistance by distributing bags of rice — a culturally resonant staple food — while providing translation support and helping residents complete their forms in real time. By meeting immediate needs and offering culturally competent assistance, this program significantly increased census participation among this key constituency.

WHAT WORKED:

- **Paired tangible value (food giveaway) with civic engagement (census completion).** Rice was a basic necessity that drove people to show up and complete their census participation.
- **Provided language access alongside the incentive.** Translation services and in-language support were available when people came for rice, making census completion easy and safe.
- **Partnered with community-based organizations (CBOs) to deliver services.** Multiple CBOs worked together to provide translation and pairing services with census outreach.
- **Created word-of-mouth momentum.** Once word got out about free rice, participation shifted dramatically — lines formed and people engaged.
- **Made it replicable.** The organization now uses bags of rice (or gift cards to Asian bakeries) for any voter engagement or turnout effort.

RESULTS:

- Created a repeatable model for civic engagement with AANHPI communities.
- Demonstrated that simple, culturally appropriate incentives work better than complex persuasion.
- According to organizers, census completion rates changed "night and day".

COMMUNITY POWER CASE STUDY #5
BUILDING GRASSROOTS LEADERSHIP THROUGH CIVIC EDUCATION (VIRGINIA, 2025)

Work conducted by participant working for CASA

CASA (formerly CASA de Maryland), a prominent membership-based immigrant rights organization, launched the "Know Your Rights, Elect Your Power" initiative during Virginia's 2025 elections. The program tackled a unique challenge: building political power in working-class Latino communities where some members cannot vote due to their immigration status. By moving away from traditional voter-only outreach, CASA pioneered a model that fused legal rights education with volunteer leadership development, ultimately building a grassroots infrastructure of over 150 trained volunteers. Providing valuable services to the Latino community resulted in greater engagement and collective action, proving that long-term political power is built by investing in communities, not just turn-out numbers.

WHAT WORKED:

- **Connected rights awareness directly to civic participation.** The program emphasized the importance of knowing your rights, regardless of immigration status. This framing made political engagement feel relevant and urgent.
- **Set clear outcome-based objectives beyond turnout.** Rather than focusing solely on voter contact metrics, the program aimed to develop 150 trained community leaders who would actively support organizing efforts and recruit 8 teams to participate in Virginia General Assembly Lobby Day.
- **Targeted strategically diverse communities.** Focused on first-time voters, historically low-turnout districts, and even lean-Republican/moderate areas where traditional campaigns often don't invest.
- **Built through one-on-ones and relationship development.** The program was community membership-led, built on trust and long-term relationships. Organizers took time to listen to member experiences and showed up as partners.
- **Created pathways for members to become leaders.** By providing accessible information, practical tools, and consistent support, members felt comfortable engaging in civic and leadership opportunities, then recruiting others and becoming leaders within their communities.

RESULTS:

- Developed 150+ community leader volunteers who actively organized
- Successfully mobilized 8 teams to participate in state legislative advocacy
- Built sustainable infrastructure through relationship-based organizing

COMMUNITY POWER CASE STUDY #6
SOVEREIGNTY-BASED ORGANIZING (TOHONO O'ODHAM NATION, ARIZONA)

Work conducted by participant leading Indivisible Tohono

Indivisible Tohono is a grassroots, community-based organization on the Tohono O'odham Nation — the second-largest reservation in the United States. Founded by volunteers with full-time jobs, it monitors federal and state legislation affecting all 22 Arizona tribes. Operating with minimal funding, the organization pioneered constituent roundtables — a format new to Native communities in this state where ordinary tribal members, not just the tribal council, could engage directly with elected officials and candidates. In the lead-up to the CD-07 special congressional election in Arizona, Indivisible Tohono created culturally resonant political events and built infrastructure that meaningfully contributed to Democratic turnout on the reservation.

WHAT WORKED:

- **Created the roundtable model for tribal communities.** Set up direct constituent-to-candidate conversations in three villages, that allowed the conversation to go where the community needed.
- **Built culturally resonant events that drew hundreds.** Mosh the Vote (rez heavy metal bands + working-class issues) is an example of a partnership event that drew over 300 people.
- **Connected issues to policy in a tri-fold format.** Every event presented what the state is doing, what the federal government is doing, and what the community sees is actually happening — centering the most vulnerable populations.
- **Built election infrastructure from within.** The Pima County Recorder, an O'odham co-founder of Indivisible Tohono, launched the first mobile voting unit on the Nation.
- **Centered wins to combat cynicism.** Constantly highlighted tangible victories to counter the overwhelming negative information environment.

RESULTS:

- In the 2025 special election, approximately 23.2% of voters cast a ballot in the primary – a notably high percentage for a special election in September.
- First mobile voting unit deployed on reservation land in Arizona.
- Pioneered the roundtable format for direct constituent-candidate engagement in tribal communities.
- Built sustainable volunteer infrastructure run entirely by community members with full-time jobs.

Case Study

2025 Virginia Small Business Organizing Program

Context

In traditional field programs, voter contact has been primarily focused on targeted doors and phones, rather than high-traffic canvassing or engagement of everyday community spaces such as small businesses. Outreach to business owners has typically been assigned to the Political/Coalitions teams and treated as a "political" function, rather than an organizing opportunity.

In 2025, the Virginia Coordinated Campaign set out to challenge that model by integrating small business engagement directly into their organizing program to expand the campaign's reach. This initiative was led by Abby O'Keefe, the Organizing Director, and her Deputy Organizing Director, Walsh Powe. The Virginia campaign did this by making small business canvassing qualify as a volunteer shift for organizers, along with traditional tactics like canvassing and phonebanking. This provided organizers with an additional tactic to reach voters in their turf and expand the menu of opportunities for volunteers to engage with the campaign.

The overarching goals of this new program were to:

- Interact with voters at small businesses that the campaign may not reach successfully via traditional tactics.
- Ensure that the campaign and candidates have a public presence by having visibility in friendly businesses.
- Expand the campaign's network of storytellers, stakeholders, and validators; ensure they are equipped with the latest messaging guidance; and highlight the impact of key policy areas on diverse constituents.
- Train and empower volunteers to have engaging, persuasive conversations with local business leaders to earn and amplify their support locally.

Tactics to Activate Small Business Owners

The campaign activated small business owners identified through this program over the course of the cycle through:

- Direct-to-Camera Testimonials: Produce and share compelling video stories highlighting individual experiences with policy impacts, optimized for social media.
- Business Partner Training: Organize workshops to equip leaders with the skills needed to effectively communicate the candidate's message in their business. This included training on digital video creation as well as messaging training on having persuasive conversations about the candidates.

To assess the effectiveness of these efforts, the organizing team tracked two core metrics for the small business program:

- Videos Collected: These were testimonials collected and submitted by business leaders
- Businesses Engaged: The cumulative total number of businesses the campaign had visibility at

Cross-Departmental Coordination

Collaboration with the Spanberger Digital, Political, and Communications teams was essential to launch this program. These external departments supported the program by:

- Identifying community targets and validators
- Providing resources for business owners to share
- Supporting digital training and content creation
- Providing weekly messaging guidance

Systems

- Friendly Business Tracker: This was the centralized system used to track all the friendly businesses, follow up, and ask all in one place.
- Resource Hub: This was a public-facing document with resources for businesses to share.

Key Takeaways & Future Recommendations

Salient Successes

- Businesses as Staging Locations – This program was effective at increasing visibility of the campaign in community spaces, especially because the campaign was able to use these spaces as a part of their Direct Voter Contact structure. Many businesses became staging locations, debate watch party locations, and places where the campaign held events for entry-level volunteers.
- Capacity Building – By expanding the campaign's reach outside of traditional spaces, organizers were able to identify and activate supporters who otherwise likely would not have engaged with the campaign. This built not only volunteer capacity but also provided a new channel to reach voters.

Changes for the Future

- Increase Structure & Requirements – This program required a lot of structure to hold organizers accountable for doing business canvasses frequently and effectively. Originally, business canvasses were a choice on an event matrix that organizers could choose from, rather than a universal requirement. As a result, some organizers used it and made lots of connections, while others didn't. One of the VA team's biggest takeaways was that this should be a requirement for all organizers.
- Increase Use of Digital Tools – The VA team felt that the program's impact could have been amplified more on digital and social channels, as well as business owners' own social pages.

Case Study

2025 Black & Latino Polling in New Jersey & Virginia

Context

In 2024, Democratic campaigns experienced declining support and turnout among some Black and Hispanic voters. To better understand these dynamics ahead of the 2025 gubernatorial races in New Jersey and Virginia, the DNC Office of Strategy + Innovation focused on understanding Black and Hispanic voters.

The goal of this effort was to better understand:

- The issues most important to these voters
- The emotional and economic triggers shaping their political views
- How campaigns could most effectively communicate with and mobilize these communities

Research was conducted between September and November 2025 through a combination of polling and focus groups. Key research partners included:

- Bendixen & Amandi International (Hispanic benchmark and post-election polling)
- Brilliant Corners Research (Black benchmark polling)
- Anthony Williams Consulting (Black focus groups and post-election polling)

Research Approach

The effort combined benchmark polling, focus groups, and post-election polling to capture both quantitative trends and deeper voter sentiment.

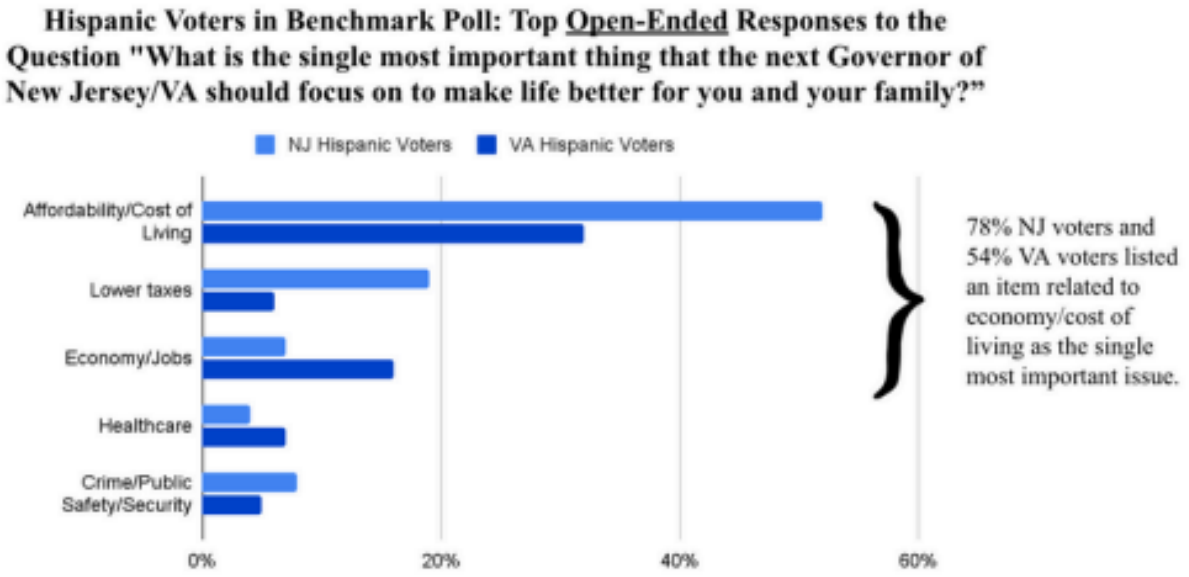
To capture more authentic responses, the focus groups incorporated:

- Real-time polling during sessions
- Open-ended written responses from participants
- Structured group discussions designed to reduce peer pressure and “groupthink”

Key Takeaways

Affordability Was the Dominant Issue

- Across every poll and focus group, the rising cost of living emerged as the top concern for voters.
- Pocketbook issues consistently drove voter attitudes and vote choice, including:
    - Groceries, housing and rent, health care costs, utility bills, insurance, and wages
- For many voters, affordability became the primary lens through which they judged politics and candidates. Messaging that did not connect directly to cost-of-living concerns often felt disconnected from their daily realities.



Voters Want Plainspoken Leadership and Real Solutions

- Participants expressed frustration with political rhetoric and broad policy promises. Instead, voters responded most positively to leaders who:
    - Acknowledged economic hardship directly
    - Spoke in clear, straightforward terms
    - Offered concrete plans that could lower monthly costs
- Voters were particularly interested in policies that would deliver visible and near-term economic relief, such as:
    - Rent protections, lower prescription drug costs, utility bill relief, and affordable child care

Impact of Campaign Outreach

- Post-election polling showed that the Spanberger campaign in VA and the Sherrill campaign in NJ were effective in reaching and mobilizing Black and Hispanic voters.
- Support levels increased from benchmark polling to post-election polling, indicating late persuasion and voter mobilization efforts played a vital role.
- Direct voter contact influenced voting decisions among:
    - 8% of Hispanic voters in New Jersey
    - 13% of Black voters in New Jersey
    - 9% of Hispanic voters in Virginia
    - 14% of Black voters in Virginia
- Hispanic voters also largely appreciated Spanish-language communication.
- Voters understood what the campaigns were about and believed the new governors would succeed in addressing affordability.

- Voters were excited to support their candidate, and turnout results show both higher turnout and among those who did not traditionally vote in an off-year election.

Which of the following best describes how you felt about your vote for Governor?				
	NJ Hispanic	NJ Af Am	VA Hispanic	VA Af Am
Excited to vote FOR my candidate	60%	59%	64%	70%
Excited to vote AGAINST the opponent	10%	16%	13%	10%
Neither excited nor unexcited	19%	18%	12%	14%
Unexcited to vote for my candidate	2%	2%	3%	3%
Didn't like any of the candidates but chose the best of bad options	9%	6%	8%	3%

- A word of caution: Democratic support is not automatic or locked in going forward. Voters want concrete results they can see in their bank accounts and feel in their quality of life. If Democrats fail to act or cannot prove that the government can be used to improve people's lives, there likely will be backlash, erasing the gains earned in 2025.

<u>Key Takeaways & Future Recommendations</u>

Salient Successes

- Affordability-Centered Messaging Resonated – Campaign messaging that focused on lowering costs and addressing economic pressures aligned closely with voter priorities.
- Direct Voter Contact Made a Difference – Door-to-door outreach, media engagement, and targeted communication played a measurable role in influencing voter participation and support.
- Candidate Visibility Built Trust – Voters responded positively to candidates who were visible in their communities and engaged directly with voters.

Changes for the Future

- Lead with Affordability – Campaign messaging should place affordability at the center of the narrative, connecting other policy issues back to cost-of-living concerns whenever possible.

- Maintain Message Discipline – Campaigns should avoid diluting their message by emphasizing too many secondary issues. Keeping the focus on economic solutions helps maintain clarity and relevance.
- Adopt an Economic Protector Frame – Candidates should position themselves as advocates for working families, clearly explaining how they will protect voters from rising costs and economic pressure.
- Emphasize Tangible Policy Outcomes – Voters respond best to specific, concrete proposals that show how policies will reduce everyday expenses.
- Connect Republican Policies to Economic Frustration – While opposition to Donald Trump remains strong among these voters, campaigns should link that opposition to how policies impact the cost of living.
- Improve the Quality of Campaign Contact – Campaign communication should prioritize trusted messengers, culturally relevant outreach channels, and messaging that reflects everyday economic realities. For Hispanic voters, both English and Spanish-language communication are critical.
- Maintain Engagement After the Election – Voters believe leaders can improve their lives, but expect to see real progress on affordability. Elected officials must continue highlighting cost-of-living wins and demonstrating accountability after taking office.

Case Study

Using Union Career Events to Rebuild Trust with Young Voters in Nevada

Context

The Young Democrats of Nevada centers its work around uplifting young people in the political process through three core values: engage, educate, and empower. Programming is intentionally designed to help young people better understand the systems that impact their lives while giving them tangible opportunities to participate in civic life.

In 2024, organizers observed growing frustration among some young voters, particularly young working-class men and young Latino voters, who felt disconnected from traditional political outreach and unsure whether their concerns were being heard. At the same time, tensions had emerged between labor organizations and Democratic institutions around policy disagreements during the Nevada legislative session.

Recognizing both the economic moment and the need for renewed dialogue, the Young Democrats of Nevada developed a series of in-person community events aimed at reconnecting young people with organized labor. The flagship event was titled *"How to Build a Career in a Union:"* a large-scale informational event connecting young Nevadans directly with labor unions across multiple industries. This case study outlines how this event succeeded in rebuilding trust between voters, unions, and the Democratic Party.

Key Objectives of the Event

1. Provide practical resources for young people by giving them direct access to unions and information about career pathways in the labor movement. Major unions from the construction trades and service sector participated in the event.
2. Reach young, non-political audiences who may not attend traditional political events but are interested in job opportunities. The speakers discussed career pathways within their industries, apprenticeship programs, union benefits, and the process to join a union.
3. Demonstrate the real-world impact of Democratic policies that help and protect workers.
4. Strengthen relationships between Democratic organizations and labor partners during a moment of friction surrounding legislative priorities.
5. Create a welcoming space for working-class Nevadans, particularly those from underrepresented communities, to learn about opportunities in the trades and service unions.

Event Branding & Recruitment

Rather than positioning the event as political organizing, the Young Democrats of Nevada framed the gathering as a career and economic opportunity resource event. This approach significantly broadened the appeal of the program and attracted participants who were otherwise disengaged from politics.

Promotion for the event relied heavily on social media. Three videos posted by the president of the Young Democrats of Nevada on TikTok served as the primary driver of attendance.

- https://www.tiktok.com/@aayosierra/video/7558188368387919135
- https://www.tiktok.com/@aayosierra/video/7559032553512996126
- https://www.tiktok.com/@aayosierra/video/7558185871430651167

Collectively, the videos generated:

- 120,000+ views
- Over 800 event signups
- 419+ attendees

Approximately 90% of attendees reported learning about the event through these TikTok videos, demonstrating the power of platform-native messaging when reaching younger audiences. The videos framed the event around economic opportunity and career development, rather than traditional political messaging, which helped reach audiences who typically do not engage with political content.

Event Environment and Audience

The event took place during a politically sensitive moment in Nevada. It occurred shortly after the end of a legislative session and just before a special legislative session, during which a major labor-backed bill failed to pass. The issue had become a point of tension between unions and Democratic lawmakers and shaped conversations in the days leading up to the event.

Despite this, the event succeeded in bringing together:

- Major labor organizations
- Local elected officials from East Las Vegas
- Hundreds of community members seeking career information

The audience was largely composed of young working-class attendees, with a significant number of young Hispanic men, alongside older workers and women who were also interested in union careers. Importantly, most, if not all, attendees were not politically active. Many were everyday workers primarily interested in learning how to improve their economic prospects rather than engaging in partisan politics.



Key Takeaways & Future Recommendations

Salient Successes

1. Resource-Based Organizing Reaches New Audiences
   Framing the event around economic opportunity rather than politics allowed organizers to reach a broad audience of working community members who are typically disengaged from political events.

2. Short-Form Video Is a Powerful Mobilization Tool
   TikTok proved to be the most effective promotional channel. Three videos generated over 120,000 views and drove roughly 90% of event awareness, demonstrating the importance of meeting young audiences on platforms they already use.

3. Labor Engagement Can Rebuild Trust
   Despite ongoing policy disagreements, the event demonstrated that direct engagement between unions, elected officials, and community members can help rebuild relationships and open productive dialogue.

4. Strong Demand for Union Career Information
   The large turnout confirmed that young workers are actively seeking pathways into union jobs, particularly during times of economic uncertainty.

5. Low-Cost, High-Impact Event Model
   The event demonstrated that impactful community engagement can be achieved with minimal financial resources. The total cost of the program was approximately

$700, which included event logistics and a $150 gift card giveaway used as an incentive for attendees. Local elected officials who partnered with the Young Democrats of Nevada contributed financially to cover the event costs, recognizing the value of the program and its community impact. As a result, the event ultimately did not require any direct financial expenditure from the organization itself. This model highlighted how strong partnerships with aligned elected leaders can allow youth-led organizations to host large-scale, high-impact events while minimizing financial barriers.

Changes for the Future

1. Increase Volunteer Capacity
   More volunteers will allow organizers to expand programming beyond logistics and focus on engagement activities such as voter registration and follow-up conversations.

2. Secure a Larger Venue
   Attendance exceeded expectations, suggesting that future events will require larger venues to comfortably accommodate participants.

3. Expand Worker Education
   Future programming could include additional information about:
   a. Workers' rights
   b. Anti-labor practices
   c. Collective bargaining protections

4. Strengthen Civic Integration
   While voter registration was initially planned, volunteers were largely occupied with event operations. Future events should incorporate a more structured voter registration and civic engagement component.

5. Extend Event Programming
   Longer event hours or multiple sessions may allow more attendees to connect with unions and ask questions.

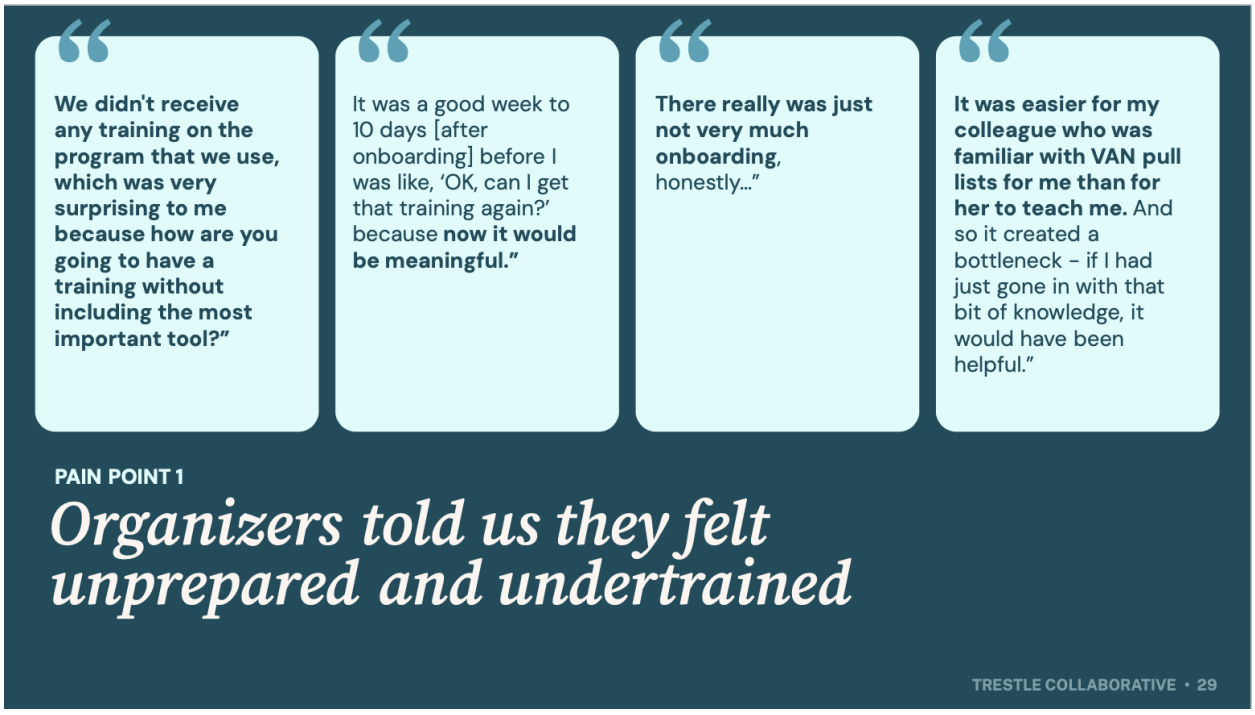
Case Study

Virginia 2025 Staff Hiring & Management Best Practices

Context

After the 2024 election, Trestle Collaborative interviewed hundreds of field organizers about their experience on the presidential campaign (***you can view their whole report here***). One of the biggest pain points that came up across states and programs was a holistic lack of training – with 60 % of organizing rating their onboarding and training as 'non-existent' to average' – and organizers not feeling prepared for their jobs — which fundamentally inhibited their ability to succeed and ruined many of their first experiences in politics.

Junior staff who feel unsupported from the get-go are more likely to burn-out and leave after one cycle, even if they had promising potential. Campaigns therefore must improve and invest in the comprehensive training and onboarding of their staff. In this section, we outline two case studies of best practices from the Virginia Coordinated Campaign in 2025 and provide resources to improve campaign hiring processes, staff management, and performance evaluation.



Case Study 1: Staff Performance Evaluation

Given the short timelines of campaigns, many teams have no formal staff performance evaluation system. Feedback is usually only shared informally or in moments of crisis, when something has already gone wrong. The result is that many staff finish a campaign with no

documentation or clear understanding of if they adequately met expectations, what they specifically excelled at, or where they fell short.

To solve this problem, the 2025 Virginia Coordinated Campaign utilized a formal staff evaluation system and integrated core competencies into 1:1s as an agenda item. In this system, managers provided feedback and a score on the six competencies, and organizers had an opportunity to reflect and evaluate themselves.

> *"This process helped us to normalize both positive and constructive feedback. It helped us coach managers to give consistent feedback and be comfortable coaching all of the time and it helped our entire organization think more critically about their role and performance in a way where constructive feedback was welcome and sought out… In the future, I'd change the core competencies every phase to more closely match our objectives."*
>
> *–Abby O'Keefe, 2025 Virginia Coordinated Campaign Organizing Director*

The Standard Organizer Core Competencies included:

- Relationship-Building
- Volunteer Recruitment
- Volunteer Training
- Volunteer Retention
- Talking to Voters
- Storytelling

Link to Staff Evaluation System

Link to Core Competency Rubric

Core Competency	Does not meet expectations	Needs improvement	Meets expectations	Exceeds expectations	Sets a new standard
	1	2	3	4	5
Relationship-Building	Struggles to build personal connections with volunteers; lacks empathy or authenticity, resulting in a weak foundation for volunteer engagement.	Occasionally builds relationships but struggles with authenticity or leading with empathy, resulting in inconsistent volunteer engagement.	Builds strong, genuine relationships with volunteers, demonstrating empathy and authenticity, and creating a foundation of trust and partnership.	Actively fosters a culture of mutual respect and partnership, building deep, meaningful relationships with volunteers and leading with a high degree of empathy.	Masterfully builds personal, impactful relationships with volunteers, setting the tone for the entire team and creating an atmosphere where volunteers feel deeply connected and valued.
Volunteer Recruitment	Fails to apply recruitment principles effectively; struggles with tone, urgency, or personalization, leading to poor volunteer engagement.	Applies some recruitment principles but inconsistently or ineffectively; often struggles with key elements like urgency or personalization in their pitches.	Effectively applies all six recruitment principles, crafting pitches that are clear, urgent, and personalized, and responding well to objections.	Consistently excels in applying all six recruitment principles, tailoring messages to volunteers and creating a sense of urgency and personal connection that increases recruitment success.	Demonstrates exceptional recruitment skills by seamlessly integrating the six principles into highly effective, customized, and persuasive pitches that inspire immediate volunteer commitment.
Volunteer Retention	Struggles with keeping volunteers engaged, failing to implement effective confirmation processes or share the impact of volunteer work.	Demonstrates some effort to retain volunteers but lacks a structured approach to volunteer maintenance or escalation, leading to inconsistent follow-through.	Effectively retains volunteers by applying strong confirmation processes, maintaining engagement, and communicating the impact of their work.	Proactively manages volunteer retention by implementing robust engagement strategies, addressing issues early, and regularly reinforcing the value of volunteers' contributions.	Exemplifies exceptional volunteer retention strategies, consistently maintaining high volunteer satisfaction and engagement by thoughtfully nurturing relationships and keeping volunteers highly motivated.
Talking to Voters	Struggles to engage voters or lacks clarity and impact in conversations, failing to address key phases like petitioning, registration, or mobilization.	Occasionally engages voters but lacks confidence, clarity, or adaptability across different conversation phases; struggles to make conversations impactful.	Engages voters effectively across all phases—petitioning, registration, persuasion, and mobilization—delivering clear and impactful conversations.	Consistently delivers compelling, persuasive conversations across all voter interaction phases, connecting with voters in a meaningful and impactful way.	Leads with empathy when engaging with voters, tailors conversations to each phase and leaving a lasting impact that motivates action, with exceptional communication skills that inspire voter commitment and enthusiasm.
Training Volunteers	Fails to provide effective training; lacks focus on developing specialized skills and does not prioritize quality conversations with voters.	Provides basic training but lacks a clear focus on developing specialized volunteer skills or quality conversations with voters, leading to inconsistent results.	Effectively trains volunteers with a focus on building quality skills, particularly in engaging voters through meaningful conversations.	Delivers highly effective, specialized training that equips volunteers with advanced skills for quality voter engagement and equips them to excel in conversations.	Develops and leads exceptional training programs that elevate volunteers' skills, ensuring they can have meaningful, impactful conversations with voters, and sets the standard for volunteer development.
Storytelling	Struggles to tell a compelling story or connect personal, campaign, or state narratives to voters, missing opportunities to engage and inspire.	Occasionally tells stories but lacks depth, clarity, or effectiveness in connecting personal or campaign narratives to voters in a meaningful way.	Effectively shares personal, Abigail's, and Virginia's stories with voters, making connections that resonate and inspire action.	Uses storytelling as a powerful tool to engage voters, seamlessly weaving personal, campaign, and state narratives into impactful, relatable conversations.	Incorporates storytelling into every voter interaction, making powerful emotional connections that inspire voters, and sets the bar for how stories can move people to act.

Case Study 2: Candidate Hiring & Evaluation Best Practices

To standardize their hiring process, the Virginia team, led by Abby O'Keefe, utilized Candidate Rubrics and Daily Hiring Check-In Meetings during peak hiring waves of the campaign. These best practice templates can be utilized and modified for any size campaign.

Candidate Rubric

The team utilized a written rubric system to ensure all candidates were evaluated daily on the same criteria and that managers were thinking about the most important criteria when assessing someone's readiness for a role.

Sample: HERE

Hiring Daily Check-in Meeting

During peak hiring waves, the team held a daily 30 minute meeting with managers to sync on hiring. They used this space to talk through how they are diversifying their pipeline, assess progress to their benchmarks, and talk through applicants together. It also allowed managers to get experience having to prepare for meetings and present their thoughts and recommendations to leadership. And, it gave the Organizing Director visibility into the process and an opportunity to give feedback and ensure managers were bringing the best people onto the team. Note that the duration and frequency of these hiring syncs may differ based on the stage of the campaign.

For the meetings, all tabs of the hiring tracker needed to be filled out completely and ready to be reviewed, and managers needed to be ready to report out on the following:

Quantitative

- Pipeline
- # of applicants in your pool
- # of 1st round interviews scheduled
- # of 2nd round interviews scheduled
- # of applicants in final stages (vet, references, approval)
- # of offers you are ready to make
- Any flags

Qualitative

- How are you working to diversify the pipeline?
- Do you feel like you are getting the information you need to make informed decisions with how your interviews are currently structured?
- Do you need any support?

Best Practices: Scoping Campaign Job Descriptions & Organizational Design

Hiring is one of the biggest determinants of a campaign's success. Without a talented and diverse workforce, even the best-funded and most well positioned campaigns can struggle to execute. That's because staffing decisions impact *every* dimension of the campaign: program quality, staff morale, ability to pivot, capacity to scale, and electoral impact. Yet for too long, establishing strong hiring processes and investing in staff recruitment on political campaigns has been deprioritized and rushed, resulting in haphazard hiring experiences and teams with unprepared leaders and staffing gaps when it matters most.

The first step is defining what roles your campaign needs to hire for and ensuring you have a clear sense of where that position fits into the broader organizational structure. Too often, campaign job descriptions are copy-and-pasted from previous iterations, without deliberate reflection on how the role may be different for this election and unique role responsibilities the position may entail.

As you're writing the job description, here are some high-level questions to ask yourself:

- What will this role actually own on a day-to-day basis, and how might that change at different phases of the campaign?
- What skills/experiences are truly essential up-front (e.g., does the candidate necessarily *need* previous campaign experience to be successful)?
- Realistically, what travel and hours will be demanded of this position?
- Who will this position report to, and how does that fit into the broader organizational structure?
- If applicable, review previous exit interviews and memos. What recommendations or suggestions have former employees made in regards to the job scope, or what issues did they encounter in the role that could be avoided?

Organizational design questions to consider, in terms of where this role fits in the team's structure:

- Are this position's responsibilities clearly defined, or is there overlap with other teams or individuals? If there's overlap, how will potential confusion or duplicative work be prevented?
- To what extent will this position work with other departments on the campaign? Which specific staffers will this role interact with laterally?
- Are all the responsibilities realistic for one person? Campaigns often need generalists in the early days, and it's not uncommon for early hires to take on more as the campaign is getting set up. What responsibilities will this staffer maintain versus what will be offloaded to additional staffers in later phases?
- At the peak of the campaign, how many layers of staff will this individual oversee and what will their maximum number of direct reports be? Is that span of direct reports realistic, or too large that another manager may be required?

Best Practices: Budgeting for Staff Recruitment

You know you need to hire, now what? To attract the best candidates and ensure no position goes unfilled, campaigns must approach talent recruitment the same way they approach their communications or fundraising: with clear tactics, measurable benchmarks, and the resources to be successful.

In the private sector, talent acquisition is treated as a core function because companies recognize that above all, people drive an organization's performance. To be competitive, campaigns need to adopt the same mindset. Valuing your talent means investing in their recruitment and development, and that requires a budget line item.

When budgeting for talent recruitment, consider:

- Flex budget to post the job on progressive job boards and partner with organizations specializing in campaign staff placements.
    - *Pricing estimate: $100-500 per JD.*
- Applicant tracking software to post your job description.
    - *Pricing estimate: low cost options like TypeForm cost <$50/month, and high cost options for more sophisticated software like Greenhouse can start at $1,000/month. Campaigns can also use Google Forms for no additional cost, but there are real limitations on the back-end to manage candidates at scale.*

From the get-go, as soon as the campaign or Coordinated is launched, every team should have a talent bank link ready on their website. This ensures you don't miss a single interested candidate, no matter their level. Even if you aren't hiring yet, this gives you a sense of the initial interest in your campaign and leads for candidates to have early exploratory conversations with.

Best Practices: Professionalize Your Hiring Process

Campaigns should establish written, clear processes outlining their hiring operations, start to finish, utilized consistently across the organization. Some departments may modify this slightly (such as a data department adding in technical assessments), but this guarantees that there is a consistent and fair process for anyone interacting with a campaign's hiring managers.

Checklist to Professionalize Your Campaign Hiring Process:

- ☐ Hiring Steps:
    - ☐ In writing, enumerate the hiring steps, such as: screener > interview > decision. Will your team conduct screeners? How many interviews will be conducted? How will these interviews take place (screener on phone, interview on Meets, etc.)?

- ☐ Core Interview Questions:
    - ☐ At the department level, standardize core questions that should be asked in the screener and interview phases. Interviewers should feel empowered to ask additional questions, but at a minimum you can ensure all candidates are being asked the same core set of questions.
- ☐ Assessments:
    - ☐ Standardize any assessments or simulations, and at what stage in the process applicants should receive the simulation and how they will be graded.
- ☐ Outreach:
    - ☐ Standardize the language hiring managers should use when reaching out to new candidates to ensure consistency in communication and establish a formal hiring process.
- ☐ Evaluation Criteria:
    - ☐ Establish screener and interview assessment criteria to ensure consistency in how candidates are being evaluated, and so that there is a standardized and written record of the interview. This creates structure to avoid hiring judgement being based solely on "vibes.".
- ☐ Timelines:
    - ☐ Set clear timelines for the hiring process and benchmarks to adhere to (interviews complete by X date, references complete by X date) and communicate these with candidates in the process. Tell candidates when they should expect to receive a decision or information on next steps. If these timelines change for any reason, be proactive in communicating these updates to candidates.
- ☐ Training:
    - ☐ Ensure that all hiring managers have been properly trained on all of the processes.
- ☐ Rejections:
    - ☐ Standardize rejection notification language across the organization, as well as guidelines ensuring all candidates are notified of an outcome of the hiring process.

<u>Best Practices: Leadership Development & Staff Coaching</u>

There are few other industries in which a staffer can amass so much responsibility, especially in terms of staff management, so quickly. Campaigns often promote staffers into management positions because they were excellent independent contributors, but effective management requires an entirely different set of skills. Even the most senior, experienced managers can benefit from supplemental and sustained training and coaching. The question for campaigns in 2026, therefore, is not *if* but *how* they will prepare their people managers

for their positions — and continue to invest in their development throughout the cycle, because the success of the campaign depends on it.

To do so, campaigns have numerous options:

- Staff training in-house, through a Training & Leadership Development Director and department who can own curriculum development and facilitation.
- Hiring external support to develop a management and coaching curriculum that is then facilitated by the team.
- Hiring an external leadership and coaching firm to facilitate management training and coaching for staff.

There are several coaching and leadership firms that the DNC, campaigns, and state parties have had the opportunity to partner with in past cycles:

- Volunteer Coaching Program (VCP)
- Women's Brain Trust
- Kinship Methods
- Redtree Strategies

Additional Resources

The DNC now has a website built exclusively for coordinated and state party staff and leadership to view and contribute training materials and resources called the Dem Training Hub. The Dem Training Hub is home to hundreds of recorded training videos and slide decks from data and tooling and voter protection, to hiring and managing staff. Campaigns can utilize these materials to build out their own training programs and repurpose the material. In addition, the DNC offers live in-person and virtual training and development opportunities for staff and leadership to build their soft and hard skills throughout every cycle. Request access to the Dem Training Hub here.

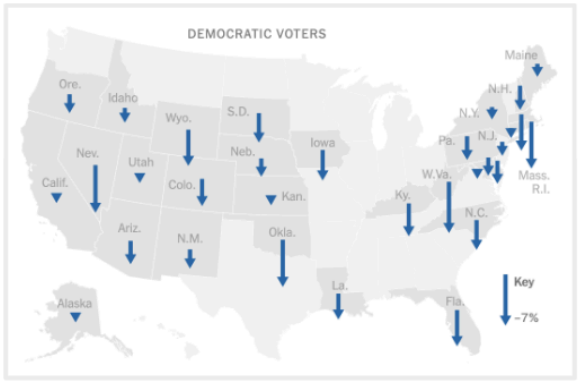
Further resources:

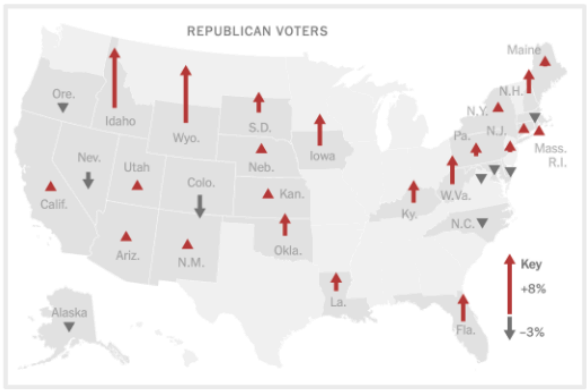
- Arena: Hiring Guide
    - Arena: Applicant and Interview Tracker
- Arena: Managing for Inclusive and Affirming Campaigns
    - Includes best practices for day-to-day team building, advocating for your team, equity and inclusion on campaigns, and how to support your staff following an election.
    - Arena: Embracing Equity and Inclusion on Campaigns
- GAIN Hiring/Interviewing Tips for Hiring Manager

Case Study

When We Count: A Solution to Democrats' Voter Registration Crisis

Democrats are facing a voter registration crisis: From 2020 to 2024, Democrats lost 2.1M voters while Republicans gained 2.4M. Furthermore, the share of voters registering as Democrats has declined. More than 60% of new male registered voters were Republican, while only 55% of new female registered voters were Democrats. This is particularly concerning when reflecting back on 2018 data, where nearly ~66% of newly registered partisan voters under 45 years old were Democrats. The map below illustrates the stark contrast between Republican and Democratic registered voters from 2020-2024:[1]





A key driver of this challenge is sustained Republican investment in partisan voter registration. The Republican Party has treated registration as a core electoral strategy, funding and executing programs through the party, C4s, and PACs, not relying solely on C3 nonprofits. Meanwhile, Democratic hard-side campaigns have largely deprioritized registration over the past decade — and the consequences are severe:

- Non-Partisan Messaging – 501(c)(3)s are an important non-partisan force that expands the universe of voters, especially voters of color. However, their legal limits restrict them from explicitly engaging on behalf of the party, missing the chance to persuade and invite new registrants to become Democrats.
- Registration-Turnout Disconnect – over the past decade, voters have been registered on the soft side, and then turned out on the hard side. This has the potential to create a fragmented pipeline, because the people registering supporters are not the same ones building a relationship with that voter and turning them out to vote.
- Skill Atrophy for Staff – five cycles of hard-side Democratic campaign staff have never registered a voter, a fundamental organizing skill.

That's why the DNC is making partisan voter registration a core strategic priority for the party in 2026. Moving forward, every Democratic campaign and state party should assess

[1] The Democratic Party Faces a Voter Registration Crisis, New York Times. August 20, 2025.

voter registration opportunities and how registration fits into their path to victory. This will require hard-side campaigns to treat registration as a core organizing function. This will vary by state and district, based on the electorate, unique race, and state laws. In some districts, a large-scale partisan registration effort may be necessary; in others, a hypertargeted strategy focused on specific constituencies or geographies might be more effective. In 2026, every campaign should be able to answer the question of if, how, and where they will be registering more Democrats.

On January 13th, the DNC announced its flagship voter registration initiative: When We Count, a National Youth Fellowship designed to rebuild Democratic registration capacity on the hard side at scale. The program will train the next generation of organizers to register thousands of Democrats in battleground House districts. This will directly close registration gaps between Democrats and Republicans and build Democratic margins in the districts that are essential to winning back the House in 2026.

When We Count is a paid, part-time national fellowship that recruits 18-29-year-old Democrats for comprehensive training in partisan voter registration best practices. Fellows will be held accountable to weekly voter registration goals, with an initial focus on non-college youth voters. In its first six months, the program is expected to train 300 fellows and register over 100,000 new voters.

The program will launch in Arizona and Nevada in Spring 2026, with planned expansion across the Sun Belt in Summer 2026. There are six battleground congressional districts across these two states, as well as critical Gubernatorial, Secretary of State, and Attorney General races. Fellows will use Reach, a relational organizing tool with high-impact voter registration functionality proven effective in 2024. Reach enables personalized registration outreach, automated follow-ups between registration and Election Day, real-time registration tracking, and local leaderboards to drive accountability, thereby ensuring new registrations convert into votes for Democrats.

Case Study

Digital Strategy for Democratic Campaigns

📋 KEY TAKEAWAYS
• 58% of Americans get news from digital — more than TV, radio, and print combined
• Use DNC resources: FactPost for clips, @TheDemocrats for memes (no attribution needed)
• Be authentic — don't force trends, caption all videos, show your human side
• Reserve handles you can't maintain; only launch accounts you'll actively use

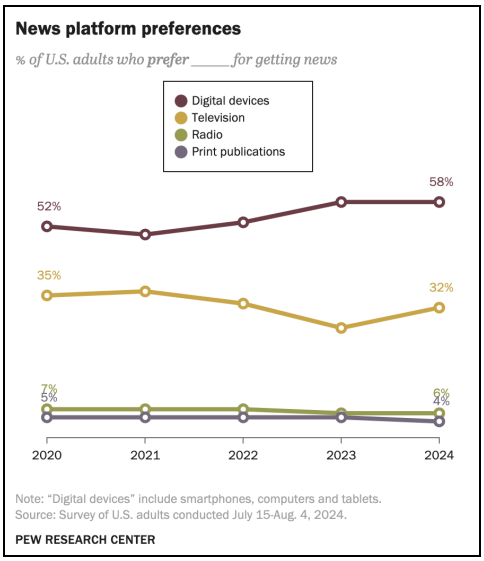
🔑 KEY ACTIONS
• Download clips from FactPost daily for rapid response content
• Make volunteer sign-ups the clearest action prompt on your website
• Caption every video (75% watch on mute)
• Register social handles early — even if you won't use them yet

💡 PRO TIPS
• Creators are constituents, not press — build real relationships
• Include non-political niches in creator outreach (sports, beauty, lifestyle)
• Search Engine Optimization gives you control, algorithms don't — invest in keywords and metadata
• Test everything: subject lines, graphics, ask amounts, button colors

⚠️ WATCH OUT
• Right-wing creator ecosystem is massive and well-funded — be strategic, not reactive
• Don't force candidates into trends that don't fit — authenticity matters
• Avoid fake urgency, fake matches, and scammy fundraising tactics

📧 CONTACTS & RESOURCES
• Creator partnerships: Matt Rein — reinm@dnc.org
• Creator resources: Democrats.org/Creator-Signal & Democrats.org/Creator-Clips
• Political email archive: politicalemails.org | Facebook Ads Library: facebook.com/ads/library

Why Digital Matters



The internet is Democrats' number one battleground heading into 2026 and 2028.

58% of Americans get their news from digital devices — that's more than TV, radio, and print combined. And when you look at political news specifically, more Americans stay informed via digital outlets than via linear television.

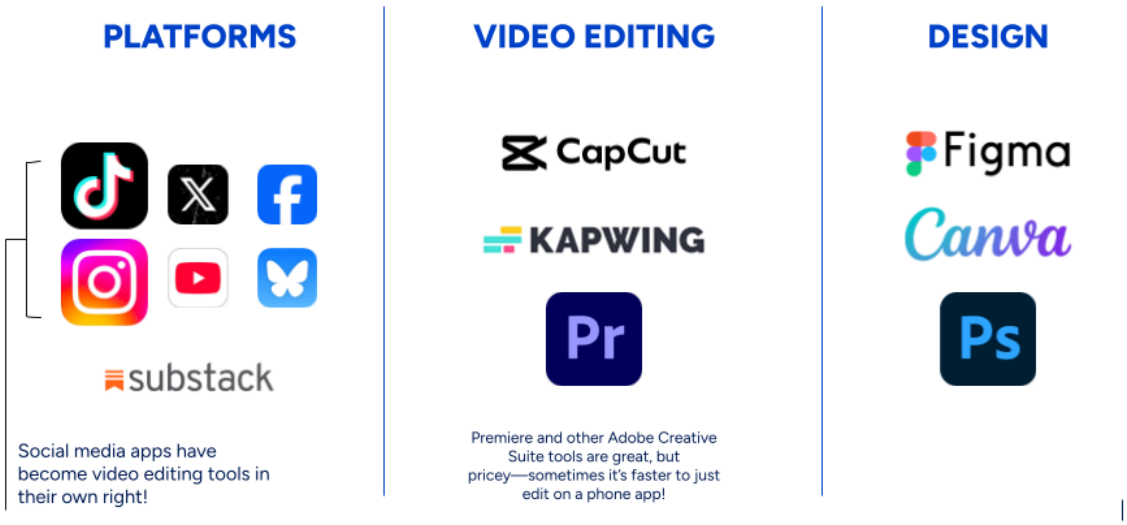
The solution seems simple: Democrats should post more and "flood the zone."

But we face significant headwinds. Over a quarter of Americans get their political news from right-wing outlets, and right-wing billionaires are buying up major social media platforms and news outlets to dominate the digital airwaves with Republican propaganda. On top of that, the right-leaning content creator ecosystem (see Turning Point USA) is massive and well-funded.

In an environment this challenging, it's important that Democratic campaigns don't just "do digital" for the sake of doing digital. We need to become more effective content creators.

Recommended Tools for Content Creation

Every campaign has different content priorities that require different toolkits. Here are our recommended tools for content creation.



Best Practices for Content

Do What Works

- Pay attention to metrics and performance.
- Campaigns should avoid launching social media platform accounts just for the sake of having them. If you aren't actively posting native content on an active social platform, don't feel obligated to launch it.
- Note: You should still register and reserve the social media handles for your candidate/campaign so that you have them on hand should you ever need them, and so that bad actors can't take them.

Use Social Media as Intended — Be a Strategic User

- Interact with other creators by replying to them, stitching (adding part of another creator's video to your own with your commentary) their content, and reposting content that resonates.

If You're a Candidate: Be a Normal Human

- Show your hobbies and interests outside of politics: Sports, Music, Movies/Television.
- Family and personal content perform well.
- Don't force yourself into trends/memes if it doesn't feel right. People want authenticity.

Caption Your Videos

- 75% of people watch mobile videos on mute, so adding captions ensures every viewer is getting the most out of your content.
- Video captioning also makes your content accessible to deaf and hard of hearing users.
- Captions introduce movement to your videos, improving viewer retention.

<u>Graphic inspiration</u>

Simple infographics

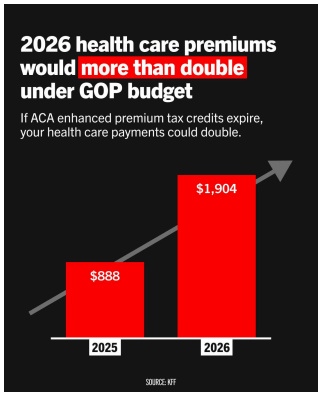




News-style updates







Panel graphics and "side-by-sides"





Video Editing

For simple, low-cost video editing, consider investing in a monthly CapCut or Kapwing subscription. Both programs offer social-optimized caption and video templates that make it easy to format news clips, remarks clips, and direct-to-camera selfie videos for social media.

Adobe Premiere, which is part of the Adobe Creative Suite, is widely recognized as the industry standard for video editing, but it can be expensive for smaller campaigns or organizations.

Design

Canva is widely used as a free or low-cost graphic design tool. If you have a bit more budget, consider investing in Figma, which is a web-based design tool that allows for easy, seamless collaboration.

Adobe Photoshop and Illustrator are parts of the Adobe Creative Suite and widely regarded as the industry standard for graphic design. For most simple graphics, you can get away with lower-cost options.

Web Strategy

How can we build strong websites to help us win in 2026 and beyond?

Leverage Your Site to Drive Volunteer Shift Sign Ups

- Make sure that your volunteer asks are the most clear calls to action (CTA) on your website.
- The CTA text should be bold, a contrasting color, underlined, etc. — anything to draw the user's attention quickly to the action you would like them to take.
- Make it as easy as possible for users to sign up to volunteer via the CTA on your website. The link should go directly to the specific event link that you are promoting.
- A good general rule of thumb is that you want to minimize the number of clicks it will take for your user to get from the call to action to actually signing up for the event in question.

Write Clear, Strong Copy

- Don't overcomplicate your copy or use fancy language. Strong copy is often simple and concise.
    - Instead of: Democrats want to reduce the burdens that fall on working families associated with the tariffs of the Trump administration, say: Democrats want to lower costs.
- Another good guideline is for your most important copy to fall "above the fold," meaning that the user should see ALL of the most important context and calls to action before they scroll down at all.

Ensure Website Accessibility

- Strong copy is accessible copy. A good goal is to aim for at or around a fifth-grade reading level so that all users can take in the information you are presenting.
- Ensure that language options are available. There are plugins/extensions (PolyLang is a good one) if you are using WordPress that can automate translation for you.

Use Search Engine Optimization (SEO)

- Websites are not susceptible to an algorithm in the same way that Instagram, Twitter or other social media platforms are to uplift content.
- One big factor you can work with in boosting content visibility on the web is Search Engine Optimization, or SEO — using keywords, image descriptions and other forms of metadata (data about the content) to ensure that a website appears as high up on search engines like Google and Safari as possible.
- The cool thing about SEO is that you have a level of detailed control over this space in a way that you simply cannot achieve via platforms that run via an algorithm.

Best Practices for Working With Content Creators

- Be inclusive! Feel free to screen creators, but do not restrict your creator network to only those that are always in alignment with your campaign, or even the Democratic Party broadly.
- (Most) creators are not journalists or communications professionals. Do not make the mistake of treating creators as just press or like they are an arm of the communications team. Creators are just regular constituents, with their own unique needs and thoughts.
- Get to know creators on an individual level, and understand how their content can fit into your messaging.
- Think outside the box. Involve cultural, lifestyle, sports, beauty, and more niches into your creator network.

The DNC Influencer and Creative Partnerships team is focused on building authentic new media partnerships that elevate Democratic values and voices. Our program boasts nearly 400 creators with 50m+ combined followers in our flagship signal, where we send daily messaging guidance and clips. We're working to build long-lasting relationships with creators that will exist beyond any individual campaign or campaign cycle.

We want to be a resource for campaigns, state parties, and elected officials by helping tap into our existing creator network, but ultimately, assist you in building your own creator networks and information channels.

First, if you know creators in your state, send them to Democrats.org/Creator-Signal and Democrats.org/Creator-Clips. These are the main touchpoints for our network and a great way to plug in to our existing infrastructure.

Second, you can contact Director of Influencer and Creative Partnerships, Matt Rein, at reinm@dnc.org for any questions related to the influencer and creator universe.

The DNC as a Content Resource

We want state parties, campaigns, elected officials, and progressive causes to use us as a resource: use our clips, and repost our memes. That's what they're there for!

If you're looking for rapid news clips and stories to download and iterate on, FactPost has you covered. FactPost is the DNC's official rapid response (content created quickly to respond to news or events) account, and it publishes dozens of clips and news stories every day for the Democratic ecosystem to create content with.

- Twitter: twitter.com/factpostnews
- Facebook: facebook.com/factpost
- Instagram: instagram.com/factpostnews

- Bluesky: bsky.app/profile/factpostnews.bsky.social

If you're looking for infographics, memes, and message framing, feel free to rip content from the DNC's social accounts. No attribution is necessary — we want to be a resource!

- Twitter: twitter.com/thedemocrats
- Facebook: facebook.com/democrats
- Instagram: instagram.com/thedemocrats
- Bluesky: https://bsky.app/profile/democrats.org
- Threads: threads.com/@thedemocrats
- TikTok: tiktok.com/@democrats

In-House Grassroots Fundraising

Why Grassroots Fundraising Matters:

While many campaigns completely outsource their grassroots fundraising to a firm, we recommend running an in-house program (and if you need extra capacity, a firm can help). Why?

- A Digital or Grassroots Fundraising Director in-house can oversee the program at a fraction of the cost of a firm.
- The team being integrated with the campaign means they have a better sense of messaging, tone, and what's happening on the ground.
- This team would focus solely on your program; strategists at firms are juggling a number of clients and programs at once.

Email and SMS

Getting Started:

- Customer Relationship Management Platforms (CRMs): We recommend ActionKit for email and Scale to Win for texting.
- List building: Ask people to opt into your email and SMS programs as frequently as you can; on your website, via ads, on your donation pages, at events, on social, etc.

A Good Email:

- Grabs the reader's attention.
- Keeps their eyes moving.
- Makes a clear ask + does it relatively quickly.
- Is personalized to the recipient, if possible.

Calendaring:

- Email and texting are great ways to communicate with donors about non-fundraising messages as well.

- Make sure you're balancing these sends with your fundraising sends.

What's Working For Others:

- Sign up for a bunch of other programs' emails, political and non-political, and take inspiration from them.
- If a program keeps sending the same email, that's a sign that that email is working for them.
- You can also check the archive of political emails here.

Things to Avoid:

- Paragraphs of more than a few sentences.
- Getting lost in the details of any given topic.
- Including the ask too late in the email.
- Giving the reader permission to tune out (phrases like "you already know this," "you may have already seen this," etc.)

Ads

CTAs:

- While you're building your email list, you can focus on Acquisition ads to acquire donor information. These ads are designed to collect new supporter info, and they can be a petition, a survey or anything that will get a donor to click and give you their email and phone number.
- Switching to a strategy that prioritizes Direct Donate ads (ads encouraging immediate donations) raised the DNC over ten million dollars in 2025 alone.

Platforms:

- We recommend running ads on Meta and Google Search. These platforms are easy to use, easy to optimize, and cost-effective.

Strategy:

- Direct-to-camera videos: videos where the person speaks straight to the camera, as if they're talking directly to the viewer.
    - An easy way to get a message to donors.
- Graphic ads: using text and images to get your message across.

What's Working For Others:

- You can check out the Facebook Ads Library here.

Direct Mail

Direct mail is the top-earning channel for the DNC. However, it also requires a large amount of cash up front. If you can afford it, we strongly recommend running a direct mail program.

The majority of political donors are older, and despite the fact that we're living in a digital age, the demographics of our direct mail donors have remained the same. Our direct mail program revenue has not decreased over the last decade plus, and we raised over $100M for the DNC and presidential campaign in 2024 through mail alone.

Best Practices

- There are many programs that use unethical, scammy tactics. Send your supporters genuine messages that make a compelling argument for why they need to donate. Be clear where the donor's money is going.
- Do NOT utilize: fake/incorrect voter/donor profile matches, urgency when it doesn't exist, or a false sense of panic.
- You should run a test on every piece of content you're putting out.
- Test subject lines, content, graphics, portraits, signers, ask amount, button color, landing page design, anything that could have any impact on your fundraising.
- Send follow-up emails, mail, or calls. Most campaigns and organizations are not thanking donors, and this makes you stand out and increases sustained donor engagement. Donors will often give a second gift when they are being thanked!
- Recurring gifts, or monthly donor contributions, help you plan your budget and maximize incoming revenue. Optimize your program to bring in as many monthly gifts as possible without sacrificing one-time revenue.

Case Study

DNC Local Listeners

Context

In traditional field programs, voter contact has often been transactional, prioritizing volume and rapid data collection over the depth of the conversation. Standard scripts push volunteers to quickly identify support and move on, leaving little room for genuine connection or qualitative feedback. In early 2026, the DNC Distributed Organizing team set out to challenge that model by launching the Local Listeners program.



Goals

The overarching goals of the Local Listeners program represented a shift in campaign philosophy, aiming to:

1. Re-think early cycle voter contact to be a listening-first approach with more thoughtful language. We wanted to move away from rigid, transactional scripts and instead focus on trust building and feedback loops with voters.
2. Scale relational organizing buy-in among supporters. We targeted training 750-1,000 volunteers as effective community listeners and leaders, online and offline. To scale buy-in for these non-traditional voter contact methods, which require a heavier touch, we leveraged these already bought-in local listeners to jump-start our volunteer programming.
3. Rebuild trust with supporters. By demonstrating that the Democratic Party values their lived experiences and concerns, rather than just treating them as a vote to be harvested, we sought to re-engage disillusioned voters and empower them to take action.

Tactics to Activate Local Listeners

The campaign activated and trained volunteers for this program through two primary mechanisms:

- The Local Listeners Bootcamp: A seven-week virtual training series held every Wednesday, designed to prepare volunteers to become trusted, community-rooted organizers. The curriculum covered community mapping, active listening 101, handling hard conversations (both on and offline), and event hosting.
- Specialized Deep-Listening Phone Banks: Trained Listeners made longer-form calls to a targeted universe: voters with a Support Score of 70+ who voted in 2020 but did not vote in 2024. The goal was to log qualitative feedback and build relationships rather than simply IDing the voter.

Calls Programming Overview

To achieve our goal of listening-first voter contact, we completely overhauled our approach to the phone bank script and training. We leveraged the Scale to Win Short Answer question type to collect qualitative feedback on the calls.

Caller training emphasized empathetic listening over persuasion. Success means understanding voter feelings, not securing a 'yes' or vote plan.

When voters are disengaged:

- Don't try to fix it: Understand *why* they feel that way. Conversations can be open-ended.
- Normalize: Acknowledge their feeling is common ("A lot of people I talk to are feeling this way").
- Be Curious, not corrective: Avoid debating. Ask: "What do you wish you were seeing?" or "What made politics start to feel exhausting?"

Note-taking (300 characters/question) must capture:

- Feeling: How they sounded/described themselves.
- Issue/Experience: The root cause of the feeling.
- Meaning: Why it matters to them.

Calls Script Summary:

Hi, [First Name], this is [YOUR NAME], a volunteer with the Democrats. I'm calling because we're having conversations with folks to better understand how people are feeling about the direction of our country right now and I'd love to hear your thoughts.

Question 1: When you think about the country right now, do you feel like things are headed in the right direction or the wrong direction? *[Even if they say they're a Republican, we still want to hear their thoughts.]*

Question 2: *Totally understood, and a lot of people are feeling that way. What's been most concerning or frustrating for you and your family?*

Question 3: *What do you wish politicians knew about you and your community?*

Question 4: *I really appreciate you sharing your thoughts on all of this. Since it's a midterm year, I do have one final question: When you think about the elections coming up in 2026, how likely do you think you are to vote?*

If Voters are Disillusioned about voting: *That makes a lot of sense — a lot of people I talk to feel that way. You don't have to decide anything today. Is there anything else you're hoping to see from politicians that you feel like you haven't yet, or anything else you want the Democratic Party to know?*

Cross-Departmental Coordination

Collaboration across departments was essential to launch this program. These external departments supported the program by:

- Mobilization & Digital Teams: Supported massive recruitment pushes through SMS, targeted emails, Substack, WhatsApp, and social media amplification.
- Comms: Supported on landing stories on the program to help create natural interest from supporters in what we are doing.
- Coalitions & Partners: Amplified the program to their networks, utilizing a specialized social toolkit.
- Research, Comms, and Legal: Reviewed and approved the listening-first script and provided regular talking points on key issues (like state-level Democratic achievements) so volunteers had factual resources.

Systems

- Qualitative Data Trackers: We utilized Google Gemini to parse through qualitative data, and collect toplines in a weekly report. All data was shared directly with the DCCC on a weekly basis, with district-specific breakdowns and quotes from voters.
- Slack / Discord Channel: Used as a community hub for volunteers to share strategies, ask questions, and access training materials.
- Resource Workbooks: Workbooks and one-pagers were provided to attendees after each session to reinforce the curriculum (access the links here).

Key Takeaways & Future Recommendations

Salient Successes

- Volunteers are hungry for this work, and voters just want to be heard. We received some of the best feedback from voters AND volunteers who are doing this work both from phone banks and from the training. Feedback included:
    - “These calls felt very impactful - keep doing them. I will do more - I will recruit others to do them. People want to be heard.”
    - “I’m actually getting more confident in my ability to talk politics with others, composed rather than insecure”
    - “This was one of the most rewarding things I have done in a year”
- Gathering Highly Actionable, Nuanced Data: The listening-first script successfully captured deep qualitative insights into voter anxieties. The feedback reports provided depth to voter feelings that traditional ID calls might miss, such as specific feelings, anxieties, and concerns rather than a check box of an issue they care about.
- Securing Volunteer Buy-In: The program successfully reframed organizing for many participants. Feedback forms indicated that volunteers highly valued learning how to approach difficult conversations with empathy and how to pivot from conversations

about what people care about, into how that reflects into actions they can take (voting, volunteering, supporting their community). They appreciated the emphasis on listening over talking and found the provided scripts for navigating disillusionment to be empowering.

Changes for the Future

- Increase CRM and Qualitative Reporting Capacity: The program highlighted the current gap in political tools for a platform that can support plain language notes as key data points. Local Listeners data and the notes and feedback volunteers were sharing was manually reviewed and synthesized, so as the program scaled, our reporting structure became difficult to manage.
- Clearer Focus on the Goals of the Training: While the bootcamp content was in-depth, the focus occasionally lost the plot when it came to the actual output we were seeking from attendees: actually engaging in conversations and reporting back. If we were to do this program again, we would center all curriculum around having attendees both engaging in and recording conversations.

For resources and materials, visit democrats.org/local-listeners.

Ground Truth

Swing Left's **Ground Truth** is an innovative, nationwide volunteer-powered canvassing program that is fundamentally transforming how Democrats connect with voters to win elections in 2026, 2028, and beyond.

This is what we will do differently:

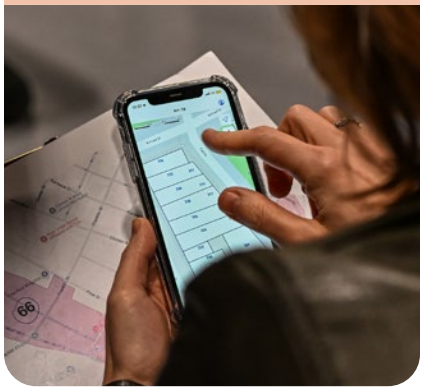
Go big by talking to all swing district voters, not just likely Democrats. Traditional voter contact targeting too often misses persuadable voters.



Listen deeply—starting earlier than ever—to voters' real-world concerns, including specific challenges faced in their communities.



With brand-new technology, directly share on-the-ground insights and rich data to strengthen the most competitive Democratic House campaigns.



About Swing Left

In 2026, **Swing Left** is laser-focused on winning a Democratic majority in the U.S. House to put a material check on the Trump administration.

Swing Left is the largest year-round home for Democratic grassroots electoral volunteers and donors. Our mission is to help people strategically channel their time and money to the most competitive races that determine the balance of power. We do not engage in issue advocacy or primaries. This results-oriented approach allows Swing Left to direct all our resources toward winning Democratic majorities.

Swing Left's impact and scale since our founding in 2017:

+$140 million
raised to elect Democrats in swing races nationwide

1 million
members and 400+ local groups across the country

50 million
voters contacted through volunteer-led door knocks, phone calls, & letters

A Radical Shift in How Democrats Reach Voters

Ground Truth is our most ambitious program ever, designed to transform how Democrats connect with voters, rebuild trust, and win elections.

- In 2024, Democrats lost ground with nearly every demographic group. The 2025 election results showed that **we can win voters back, but only if we show up and listen**.
- Too often, **campaigns rely on outdated technology, incomplete voter data, and narrow targeting** that overlooks potential supporters who could be the difference in tight races.
- **Voters and volunteers are tired of short-term, transactional outreach** that starts too late, misses the mark, and ends abruptly after Election Day.

Historically, Swing Left has funneled the energy, time, and resources of our 1 million grassroots members directly into existing campaign infrastructures. That means we have seen the obstacles to effective canvassing up close.

Campaigns typically focus their targeting on people who are modeled as likely Democrats, but that information is often based on unreliable data that makes assumptions about who people are. This type of targeting means that Democrats are not even trying to talk to huge numbers of potential supporters in their districts. In addition, typical campaign canvassing does not start until shortly before Election Day. These last-minute conversations are often reduced to quick, transactional exchanges focused solely on turnout rather than persuasion or trust-building.

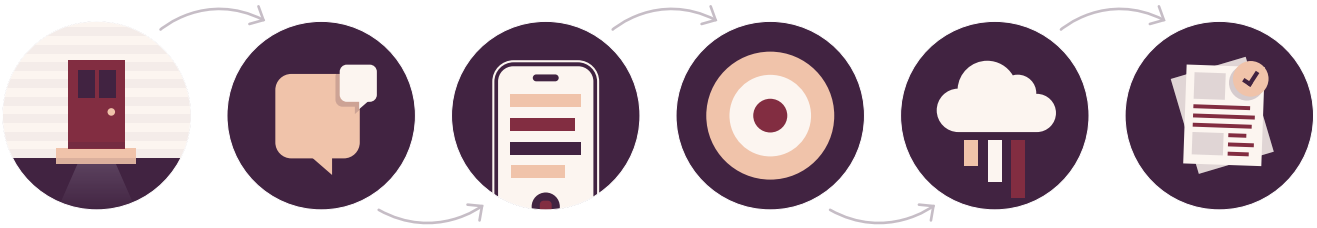


By leveraging a 2024 Federal Election Commission (FEC) advisory opinion, Swing Left is able to run our own canvass program for the first time this election cycle, while still coordinating directly with campaigns.

With Ground Truth, we will knock every door in our targeted areas and pair face-to-face volunteer-led conversations with AI-powered technology designed to capture, track, and draw actionable insights from what voters are really experiencing. And then we will share all of that data with House campaigns and state parties.

A New Model for Listening and Learning

Ground Truth centers deep listening and substantive conversations with every voter in a competitive House district. To develop our program and scripts, we are consulting with the deep canvassing experts at the New Conversation Initiative, who have extensive experience testing and identifying effective persuasion techniques. Ground Truth reimagines voter contact, starting earlier than ever—well before most campaigns have the infrastructure to run voter contact programs—incorporating new technologies, improving voter file data, and sending critical insights to campaigns to help inform their targeting and messaging.



Volunteer canvassers knock on every swing district door

Canvassers have real conversations with all potential voters

Canvassers record voice-to-text memos summarizing each interaction at the door

Text data gets aggregated and analyzed by AI & Swing Left

Key insights from the data are shared directly with Democratic campaigns

Campaigns can tailor their messaging and outreach to their constituents' needs

By starting outreach more than a year before Election Day, volunteers are helping campaigns identify and build genuine relationships with disengaged or disillusioned Democrats as well as persuadable Republicans and Independents. Every conversation is designed to go deeper, with volunteers trained to have 10- to 15-minute discussions that focus on listening, not delivering talking points.

Through Ground Truth, Swing Left is uncovering potential voters who would otherwise be missed and identifying new paths to victory in 2026 and beyond.







Brand-New Technology

Behind this effort is a new constellation of technologies that Swing Left has helped build to power deep listening, analysis, and information sharing at scale:

A canvassing app, developed with the progressive technologists at Everybody Techworks, allows volunteers to voice-record open-ended notes, summarizing the nuances, insights, and feedback from conversations with voters. This technology, never before used by federal campaigns, allows for much more information to be collected on voter sentiments and builds more substantive profiles on voters than the traditional canvassing checklist.

A central database that allows us to store and integrate those insights across conversations and districts. We have partnered with leading tech executives and longtime Democratic Party technologists to support and scale this platform, which is being designed to address shortfalls of existing systems. This modern infrastructure will provide organizers with new, streamlined tools for storing, managing, and using voter contact data.

Rigorous AI analysis, coupled with human review, which identifies trending issues in each district, as well as patterns of frustration, hope, and distrust that traditional polling and canvassing often misses. We have brought on an AI consultant with significant industry experience to design the process of pulling the learnings and stories out of the data.

Secure sharing of deep voter insights with Democratic campaigns. In addition, any voter contact data, partisanship information, and issue concerns we collect will be integrated into Democratic voter files through the Democratic Data Exchange, which allows us to seamlessly share this data.

Together, these components fill critical gaps and limitations in legacy tools designed for short, scripted voter contact and outdated data models, and create the foundation for sustained, trust-building conversations. For more information on this technology, please contact Gautham Arumilli at gautham@swingleft.org.

Early Findings Point to Untapped Potential for Democrats

In fall 2025, Swing Left ran 25 pilot canvasses across 14 of our **target House districts** to validate this approach. Results from Ground Truth's pilot canvasses reveal significant opportunities for Democrats:

Voters feel the system is broken

About 50% of Republicans, Democrats, and Independents alike mentioned broad frustration with both political parties and a sense that the government is not working for them. Notably, we have not yet seen a federal or state party entity systematically tracking this theme in their canvassing and voter files.





There is untapped voter potential for Democrats

Democrats have an opportunity to make up ground with the demographic groups they lost in 2024 and also persuade Trump supporters. Expanding whom we talk to and improving how we engage with them can uncover meaningful new support. In our pilot data, 1 in 4 of the voters campaigns typically classify as very unlikely to support Democrats actually expressed serious concerns about Trump's actions and the direction of the country—indicating that traditional voter contact efforts are missing potentially persuadable voters.

Voters are eager to engage

Two-thirds of people who answered their door were willing to have a real, 10- to 15-minute conversation with Ground Truth volunteers. Voters across the spectrum also expressed their pleasant surprise that Democrats are interested in talking and listening to them, not just asking for votes—an important step in rebuilding the broken party brand, and proof that when someone shows up and listens, voters are eager to be heard.





Single-issue framing is insufficient for capturing voter motivations

We are finding that voters' concerns and motivations are nuanced and can't be boiled down to one or two checkbox issues. Ground Truth's approach is helping Democrats think more holistically about the narratives people believe in and what truly drives their engagement.

Dive deeper into the key findings of our pilot program at **ourgroundtruth.org/key-findings-pdf** and review a thorough case study in IA-01 at **ourgroundtruth.org/case-study-ia-01**

Pilot key findings

IA-01 case study

Scaling Up for 2026

Following the September 2025 Ground Truth pilot, Swing Left expanded the Ground Truth program to volunteers nationwide in December 2025 to help Democrats win back the House—bringing deep-listening canvasses and phone banks to our **full slate of battleground districts** where control of Congress will be decided. Swing district canvasses and phone banks are ongoing and scaling up.

The next phase will layer in a focused persuasion strategy, exploring voters' feelings about Democrats and barriers to supporting them in the midterms. The qualitative data collected from these conversations will provide a roadmap to persuasion in the 2026 midterm elections.

Working directly with Democratic candidates in our defensive and red-to-blue districts, Ground Truth's early, data-driven, and pragmatic approach aims to help Democrats strengthen trust, build lasting relationships, and win critical elections to help stop Trump and the GOP.

If you are working in a state that includes a Swing Left target district:

Contact political@swingleft.org about possible coordination opportunities.
Contact tech@swingleft.org if you are interested in accessing Ground Truth data.

Ground Truth

Ground Truth Pilot Key Findings

Last updated: 11/16/25

Ground Truth is not just another field program—it's infrastructure for understanding the electorate in new ways that will help Democrats defeat Republicans in competitive elections. At scale, deeply listening to voters can be the foundation for persuasion, trust, and long-term repair of the Democratic brand.

This memo summarizes early findings from 467 conversations with voters in 12 congressional swing districts across multiple pilot canvass sites in Arizona, California, Colorado, Iowa, New Jersey, New York, Oregon, Pennsylvania, and Wisconsin between September and November 2025.

Volunteer canvassers were trained to knock every door and guide whoever answers through an open-ended conversation about our country and their place in it. In addition to the usual survey data, canvassers recorded detailed summaries of their conversations, enabling us to use new technology to tap into a fresh source of voter insights, which we have begun sharing with campaigns (in districts with a Democratic incumbent), state parties, and other key stakeholders.

Challenge	What Ground Truth Solves
Campaigns start too late and talk to too few people.	We talk to *everyone*, early—not just "likely Dems."
Persuadability is notoriously difficult to model with voter file data.	*Qualitative texture at scale* reveals hidden openness among voters coded as Republicans and Independents.
Democrats struggle with trust and perceptions that they deliver for voters	Conversations provide *follow-up pathways*, connecting voters to resources and demonstrating responsiveness.
Down-ballot campaigns often lack critical focus-group resources.	Ground Truth provides *free, real voter insight* to red-to-blue and resource-limited campaigns to complement polling.
The electorate is demoralized and turned off by politics	Listening resets the relationship, turning distrust into dialogue.

Stories in the Data

1. Voters are eager to talk and they want the parties to hear them.

Democratic campaigns have systematically underestimated the public's appetite for real conversation. *The barrier is not disinterest; it's distrust and fatigue with when and how campaigns normally show up.*

- Across pilot canvasses, **~2 out of 3 answered doors turned into substantive conversations**, often lasting more than 10 minutes. The listening-first posture combined with the fact that most voters aren't being talked to this early in the cycle both probably contribute to higher engagement than in typical canvassing.

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2. Because traditional voter contact methods are limited, they often miss existing Democratic supporters as well as persuadable voters.

Campaigns do their best to make efficient choices when time and resources are tight. Typically, campaigns focus on likely Democrats who need to be mobilized. Casting a wider net that includes less likely voters is slow and labor-intensive, and not traditionally prioritized, especially in the final stretch before Election Day.

Ground Truth shifts the timeline and capacity assumptions underlying that strategy.

Beginning earlier and mobilizing a massive volunteer base to knock *every* door means we can identify and engage voters who are often missed by traditional voter contact strategies. The pilot suggests that less likely Democratic voters show real openness at this stage in the cycle and our data can help inform campaigns about who is persuadable, who might be discouraged or drifting the other way, and who we should in fact leave out later on.

- Early analysis suggests **about 1/4 of voters coded as Republican (either through registration or modeled partisanship)** expressed either:
    - explicit concern about Trump,
    - openness to voting for Democrats,
    - or alignment with progressive priorities.

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3. Disillusionment dominates the emotional landscape, not ideology or a particular issue.

In open-ended conversations that begin with asking about the direction the country is headed—across Republicans, Democrats, and Independents—the most consistent theme was **"the system is broken."**

In **nearly half** of conversations, this showed up as:

- frustration and disillusionment with both parties,
- distrust of institutions,
- disappointment in leaders, and
- a sense that "no one is looking out for people like me."

It signals a need to rebuild trust through sustained conversation, over a longer period of time than campaigns typically can do.

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4. Ground Truth fills a structural gap in the Democratic ecosystem.

How we close that gap:

Current System	Ground Truth Provides
Polling and modelling provide valuable insights about aggregate voter sentiment, but don't allow two-way interaction with voters	**Direct conversations between voters that reveal emotional and narrative drivers, similar to that of a focus group, but at scale**
Campaigns only have the time and resources to focus on mobilizing likely Democrats, and at best have very narrow persuasion universes	**Knocking on every door in a neighborhood uncovers hidden persuadable voters (including lapsed Democrats) that *expand* turnout universes for campaigns**
Resource-strapped flippable GOP and vulnerable Democrat House campaigns rely on insufficient research that often comes too late	**Free, structured, and early qualitative voter insights**
Short-term, late, and transactional voter contact	**Year-round trust-building that grows and sustains volunteer enthusiasm and the Democratic Party's brand**

What's Next

In early 2026, Swing Left will expand Ground Truth into a nationwide voter contact program focused on federal races, starting with the battleground House districts on Swing Left's target map.

And beginning in January, Ground Truth will include focused partisan persuasion strategies in our voter contact conversations. While the foundation of these conversations will continue to emphasize long-form listening, we will add questions to our script that home in on voters' feelings about Democrats and barriers to voting for Democrats in the midterms—not only their views on the state of the country.

If successful, the qualitative data we collect from these conversations will paint a detailed picture of the challenges Democrats face to winning over new voters—and winning back voters we've lost—providing a roadmap to effective persuasion and critical wins in the 2026 midterm elections.

Reflections on Ground Truth from Canvassers

When asked after their pilot canvass about their experiences, **93% of volunteer canvassers indicated they would recommend Ground Truth canvassing to a friend**.

As reflected in the testimonials shared below,many canvassers, both experienced and novice, consistently reported:

- **Voters are willing to talk when approached with curiosity and respect**
- **People were more open to talking than in a traditional canvass**
- **Republicans who strongly disagreed with them were willing to talk, and that alone felt like a small step toward lowering the political temperature**

In their own words:

"Just so rewarding how hungry people were to be heard. **Even Republicans thanked me for doing this. Heartening.**" — Elise J., Experienced Canvasser, CO

"Ground Truth canvassing is just having conversations with people. It felt good to ask open-ended questions and listen to the answers without the pressure of getting a

commitment to a candidate or a plan to vote, so the experience was much deeper. **Everyone I spoke to was happy to talk, and to share their fears, their anger, and their hope.**" — Mara D., Experienced Canvasser, IA

"**I drove home thinking that Ground Truth can provide so many benefits like hearing issues first hand, establishing a deeper relationship with voters AND it also occurred to me that it can be a real differentiator in terms of the brand of the Democratic Party.** I felt like an ambassador for the party and felt as though we left a good, open-minded impression even with the Trump supporters. I would expect this would be received even better by independents. If we are the party of empathic listeners, consistent presence, and courage to talk to everyone, that has to mean something at the ballot box when voters are considering their options." — Ben E., First-time Canvasser, CO

"What was most inspiring was how much people wanted to talk and be heard. It was very encouraging to see that **regardless of political views, people appreciated the opportunity to share their views with a stranger at the door,** and I also appreciated that even when it was with someone who completely supports Trump, the exchange was civil and respectful." — Alex S., First-time Canvasser, WI

"Ground Truth made it **easy to connect with people on a human level and learn what's important to them without putting transactional politics front and center.**" — Michae K., Experienced Canvasser, OR

"I feel that direct engagement in as many ways as possible with all voters, including our opponents, is one of the most important things we should be doing for the upcoming election cycle. **Our biggest problem is not just in finding enough votes to regain control of the branches of government but in breaking down the silos that are destroying the societal bonds necessary for democracy in the first place.**" — Mark S., First-time Canvasser, AZ

"It was good that **I could have a friendly conversation with a Republican.**" — Nora D., First-time Canvasser, IA

"**Knocking every door led to some remarkable conversations with people who we probably wouldn't have met through traditional canvassing**. In addition to the potential improvements to voter contact and positive effect on electoral results, **Ground Truth opens the way to the longer, harder but maybe most important work of starting to have meaningful conversations with those who don't share our views.**" — Bill M., Experienced Canvasser, IA

"**This approach is innovative and much more satisfying than traditional canvassing!** It's also a lot easier to use the app. **I really liked talking to everyone and not selecting a narrow cohort of potential voters.** I also appreciate having new strategies looking forward to the 2026 election!" — Michelle I., Experienced Canvasser, OR

"**People surprised me with their willingness to share their stories.** I think when we aren't trying to pressure people into voting or supporting a particular position, we can really connect with them and learn a lot." — Drew L., First-time Canvasser, OR

"**We met a woman, maybe in her fifties, poor, who was very strong and had a very hard life, very hard.** She said what was wrong with this country and Trump but never votes, voted only once in her whole life. She is registered. She said she goes to vote and they want her to check the boxes of what she is, and bec her skin is white they think she is white. But her father is black and she also has Cherokee blood and some Italian and then they want her to put down which tribe and by the end she is just disgusted. **We were able to say how well she spoke, that she was smart and insightful and that she mattered and her vote matters, and to think about that. We took notes and recommended that she be contacted again.**" — Laura K., Experienced Canvasser, NY

"**If you like talking to people—especially hearing your ordinary fellow citizens share their feelings and circumstances without pressure to do it quickly—then this provides real ground truth experience.**" — Sandra R., Experienced Canvasser, AZ

Exemplar Voter Conversations

Transcriptions of canvassers' voice notes show the texture, nuance, and emotional valence of the broader themes in the data discussed above with richness similar to a focus group. These selected quotes were cleaned for legibility and flow and are grouped into three patterns emerging clearly across the canvasses:

1. Canvassing reaches voters who aren't "ours" on paper and many will talk.
2. Disillusioned, unaffiliated voters are not apathetic; they are waiting to be engaged.
3. Democrats who feel ignored respond strongly when they are genuinely heard.

1) Canvassing reaches voters who aren't "ours" on paper.

Even among Republicans or Republican-leaning voters, canvassers held substantive, respectful conversations; several expressed openness to continued engagement.

(NY-17 • Male • Lean Rep)

Great long conversation—spent about 15 min talking though his window as he was mopping his floor. **A Black man in his 50s, he is extremely disillusioned with the Democratic Party** and feels like **Dems are totally out of touch with normal people.** He talked about how Dems are obsessed with helping immigrants but **"do nothing to help the people here who are struggling."** He said our schools are falling apart and **"I don't even know what they're teaching kids anymore"** because it feels like **"schools are more interested in teaching pronouns than the ABCs and 123s."**

He feels like the party is being taken over by **"extremists"** and mentioned **Mamdani and AOC** as examples. He also feels like the party is **"run by old women and effeminate men"** who **"don't understand that men want to be men, provide for their families—and boys don't want to be told that playing with GI Joes is toxic."**

He feels the **Schumer shutdown** is an example of how **Dems don't know how to actually fight Trump** on a shutdown that will **"hurt people who depend on government benefits more than anyone."**

He said he **voted for Biden**, but now **identifies as an independent** and is **probably going to vote GOP.** He said **"it's unclear what Democrats stand for, and I know Trump could destroy the country but I feel like the risk with Dems is even greater because there's no plan. It's like a car in neutral backsliding on a hill with all the windows blacked out."**

He said Democrats **need to do way more to listen** and understand voters, and he was **eager to share his contact info** so Democrats could **follow up** about concrete plans.

(NY-4 • Female • Strong Rep)

[She] is a Republican. She spent a great deal of time talking to me. She is mostly concerned with **the amount of hate that goes both ways** in our country now. She feels that **on both sides of the aisle, invectives are being hurled**, and that's not the way she grew up—**there used to be conversations and constructive conclusions.**

She is a **Trump supporter.** She feels that **he generally does the right thing**, but **sometimes he puts his foot in his mouth**, though **she believes he has the best intentions.**

Her big issue is **immigration.** She feels that **too many people are coming in and are "sponging" off the government.** She said **she personally knows immigrants who work and contribute**—and the struggle for her is **how to tell the difference**.

She was **very glad** I came by and spent time with her. We agreed that **"we need to listen to each other and agree that we disagree."** She was **cordial** and **gave me her name.**

(AZ-1 • Male • Strong Rep)

I had a long conversation with [him]. He had a lot of questions about what we were out doing and **wasn't sure he wanted to talk** until I explained the purpose. He agreed to speak with me.

He said he believes the country is going in the **right direction**, and that **Trump is doing what he needs to do**, but that **he needs to "shut up"**—**not because what he says is bad**, but because **Democratic leaders will attack and make fun of anything he says.**

He said **his vote matters**, and he **always votes.** He is **very involved in local politics** and has met with his representative. One of his major concerns is **health care**, especially because of **family history of Alzheimer's and dementia.**

He emphasized that **what we need is talking to one another in a civil manner and hearing each other out** to come up with **better solutions.**

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2) Unaffiliated and disillusioned voters were receptive and often relieved to be engaged.

These voters are not apathetic; they are disillusioned. They stayed in conversation and articulated thoughtful concerns.

(WI-3 • Male • Party Registration Unknown)

Here we go **social media makes things 10 times worse** he wants to see the parties **come closer together again** as opposed to being polar opposites he had a deal about **educating younger people about using AI intelligently** he **does not like the politicians** he sees

purely chasing money and **not actually there for policy anymore** he does not like how **AI can make content.** He also sees that there's just a **large gap in common sense values** for shared aspects of lives for people to really come in.

He said there is **no practical difference between either of the two main political parties. Both are evil** and **do things to gain attention.** The other large issue is that **nobody is held accountable for practically anything.**

He mentioned personal examples of people he knew in Minnesota legislature at a variety of levels, **not speaking out against colleagues for poor behavior**, and said you **cannot solve money problems by throwing money at them.** He wants **policies that make sense**, such as **ultra-small housing communities with conditions and accountability.**

He also said he **wishes there was a third party** to **hold the other two accountable** and **soak up the disillusioned voters.**

As a final note, he sees **mental health treatment as a much bigger priority than gun control.**

He said he works in **tech** and has a **high-level job** and is **friends with both Democratic and Republican politicians** in Minnesota.

(NY-4 • Female • Party Registration Unknown)

I just talked to 36-year-old [redacted name] (no 37). She is a **teacher** has been teaching for the last eight years and really just talked a lot about the **economy**, **about how she's been in the same general field of work and lived in the same area for all this time but her lived experience just feels a lot different than it did five years ago and 10 years ago.**

She said it feels like **millennial disappointment** to a certain extent—**"I went to college. I did the right things and I still feel poor and struggling and living paycheck to paycheck."** She said she **can't keep her head above water.**

She said **it doesn't really feel like Democrats are reflecting that** and **it doesn't really feel like Republicans are reflecting that.**

She said **Trump talked a lot about money and the economy**, criticized Biden's economy, but **then did the opposite**, and **everything has felt more expensive and out of reach.**

With Democrats in office, she felt **nothing got better, but it didn't get worse either—just not better.**

She said **she doesn't know if it makes sense to vote** and just **get more of the same**, or **not vote and get more of the same**, because **"either way the results feel bad."**

(NY-4 • Female • Party Affiliation Unknown)

I had a long conversation with [redacted name], who described herself as **a day-one Trump supporter** in 2016. She was invited to the inauguration, and when she couldn't attend due to back surgery, she received a lithograph of the White House that still hangs in her home.

She has since turned strongly against Trump after his administration's cuts to SNAP benefits and threats to Medicaid and Social Security. She said, "Elderly people can't learn how to shoplift at this point in their lives," calling the food benefit cuts "the 9/11 of our nation."

She now volunteers to raise money for food pantries and described how the cuts have affected her special-needs daughter. Judy said, "Trump lost my trust." **She still has cultural reservations—she bought a German shepherd during the 2020 Black Lives Matter protests out of fear and remains skeptical of some Democrats—but her frustration with Republican policies is clear.** She called herself a "conservative Democrat" once and said that "too many people now just take from the country instead of giving back." **She remains independent-minded, but open, thoughtful, and highly engaged.**

(PA-10 • Couple • No Party Affiliation)

I spoke with a husband and wife who both work for the federal government. They said they're **legally bound to be nonpartisan, but they're sick of the fighting and gridlock.** The wife said she has to say **"both sides are to blame," but she's frustrated that nothing gets done and that Congress has become too nationalized, focused on party power instead of districts.**

The husband said **Democrats are "bringing a knife to a gunfight"** and need to act as a cohesive unit. **He wants to see Democrats "stop worrying about being so bipartisan and just do what needs to be done to save the country."** He said Trump "can destroy in one

term what Democrats took decades to build," and that there should be safeguards so that can't happen again.

Both were thoughtful and candid, and even though they were critical of both parties, **they were eager for a deeper conversation about how government could work better.**

(OR-5 • Male • Party Registration Unknown)

I wanna add that **[he] is interested in having somebody come back and check with him at a future time.** He was **a little doubtful that much would have changed**, but he was still **willing to have somebody return** and connect.

We knocked even though there was a **no solicitation** sign and **[he] answered the door** and said he **would be willing to talk.**

He said the country is headed in the **wrong direction** because **everybody lies these days.** He said **Presidents lie**, plural, and **he did not like this lack of accountability.**

He mentioned **Oregon Department of Transportation always coming in over budget**, which leads to **inflation**, and said while he is doing **okay**, it **impacts his family** and many others.

He also mentioned **divisiveness** and how **divided we are.** He said he is **independent**, can **see both sides**, and **does not agree** with people who say **one side is all wrong and the other is all right.**

(NY-17 • Male • Party Registration Unknown)

We met this man in the hallway and he helped us translate with a woman who spoke only Spanish. He is **fluent in English and Spanish.**

He said things are **going in a terrible direction. Everything is wrong. Especially the price of things**—he **cannot afford food.**

He said he **didn't want to talk to people**, but **we felt he was very engaged** in the conversation.

We **believe follow up would be useful.**

He had **a lot of energy and stamina** in the conversation.

(AZ-1 • Party Registration Unknown)

I'm out with [him] and **he was very willing to speak with me**. When I asked him about the right direction or the wrong direction he replied, **mostly in the wrong direction** because he thinks **people's freedoms are being stepped all over** and he doesn't believe that **anybody has had the best interest of this country in mind except for Ron Paul.**

When I asked him if he thought his vote mattered, he said **it mattered on a local level** but on a **national level politicians from both parties do the same thing** so it doesn't impact his life.

He told me he had been **stopped by two other canvassers already but still wanted to talk more.**

He said **nobody has had the interests of American citizens in mind other than Ron Paul for years.**

He **doesn't have use for either party. They both say the same thing and then do the same thing once in office.**

He is moving to Indiana. He votes, but **doesn't feel his vote matters nationally.**

He said the country is going in the wrong direction in terms of **democracy**, citing **lawlessness**, and mentioned wanting to **defund the CIA, BlackRock, Vanguard, the IRS and others.**

(NY-4 • Male • Party Registration Unknown)

I spoke with…**a young man who's deeply disillusioned and believes both parties are concealing larger and more sinister truths from the American people.** His dream is for Americans to pull together to face these forces as one. He said America has lost its spiritual or community spirit.

On a recent trip to El Salvador, his parents' country of origin, he said he "felt God everywhere" and contrasted that sense of community with the isolation he feels at home. He's deeply concerned about how resources are allocated in the U.S., using **homelessness as an example of a solvable problem if priorities were right.**

He said **he doesn't trust any news outlet and tries to do his own research, though he recognizes algorithms limit what he sees.** He believes local politics matter most but are neglected. **When asked which party best reflects the social-justice teachings of his faith, he said neither.** He didn't seem likely to vote without being meaningfully engaged by a candidate on issues he personally cares about, but **he was open to dialogue and seemed to appreciate the conversation.**

(OR-5 • Male • Independent)

I met [name redacted], who said he would be willing to talk again, though he doubted much would change. He said the country is headed in the wrong direction because **"everybody lies these days—Presidents, plural."**

He's frustrated by the lack of accountability and **pointed to examples like state projects going over budget leading to inflation.** "I'm doing okay," he said, "but it impacts my family and a lot of others." He spoke about how divided the country feels, saying he identifies as independent and "can see both sides." **What bothers him most is when "people in one party say the other is all wrong." He appreciated being listened to and said he would talk again in the future.**

(CA-45 • Male • Party Registration Unknown)

When I asked about the direction of the country, he said "mixed." T**he bad, he said, is the affordability of basic pillars—housing, education, healthcare—which have all gotten more expensive in the past 25 years**.

The good, he said, is that "the U.S. is still better off than other countries," though he worries it won't stay that way. His parents immigrated here 75 years ago, and he said, "I know what they went through."

He believes voting makes a difference locally but not nationally, and said **"the agenda at the top for both parties is spread very thin—like mayonnaise."** He's **frustrated with taxes and the cost of living but still pragmatic and open to conversation.**

3) Democrats who felt ignored were relieved to be heard.

These conversations reflect **base retention**—appreciation for listening, emotional relief, and willingness to stay engaged.

(OR-5 • Democrat • Lean Dem)

This is a note for [name redacted]**. She initially said she didn't really have time to talk**, but she **would be glad to talk** with me and answer a few questions.

Teddy is **82 years old** and lives with her son. She said she wasn't so aware of what Biden was doing. She said **politicians have "dissociated themselves from everyday folks."**

She has a lot of concerns about **people who don't have the basics of life—food, jobs, healthcare.** Her husband had been a **Vietnam veteran.** They had five kids. She **experienced food insecurity** and relied on neighbors for support, and she is **very aware of how people struggle** when they don't have the resources they need.

She said the **last president she really liked was Kennedy.** She said she **voted for George Bush Sr.** and that **she'll vote for whoever is doing good things for people**, whether Democrat or Republican.

She **wasn't happy with Trump** and how he has been running the government. She said **she is open to more conversations.**

(OR-5 • Female • Strong Dem)

OK, I had a long conversation with this woman. **She's Asian and has several children** and it was really kind of an **emotional conversation** and she came to the door and was **interested that I wanted to hear what she thought** about how things were going.

She was tentative at first, and she said **she feels like things are good in this neighborhood.** Things are going well here and she feels really good about her neighbors. **The thing she cares most about is her kids and their school** and she thinks the school is pretty good and that the buildings need to be kept up and that maybe there will be a bond for that.

But she said that as a minority, she and her husband have felt a lot of attention since Trump was elected and they don't always feel safe. She said that they used to read the

flag as something positive and now, depending on how it is displayed, **they don't know if the American flag includes them or not.**

She said that **locally things feel okay**, but **nationally things feel tense and fearful**, and that **politics makes it worse instead of better.** She said this **climate of tension and fear weighs on her.** She gave this metaphor: **it's like there's a ship and the mechanisms are broken. Congress is broken. National politics are broken. And that leads to a real anxiety that affects people.**

It was a wonderful conversation. She **gave me her name and email** and **she appreciated the conversation.**

(OR-5 • 57 year old Female • Democrat • Lean Rep)

[She] was very friendly and very interested in talking. Her big issues are **the 1% tax** on certain dollars for homelessness. She **doesn't feel it should just be for upper-income people.** She **doesn't think she is seeing results** for her tax dollars—this was **a common theme** across many topics: **"money is being spent but nothing seems to be getting better."**

She is **concerned about healthcare** access for her college-aged daughters. Her niece has struggled with **drug addiction**, and while she is empathetic, she **still feels like results are lacking.**

She **works in downtown Portland**, sees the situation first-hand, and **does not see improvement**, but she is **still deeply attached to the place**—a **lifelong Oregonian who loves Portland**.

She said she would **be happy to help** if there were a way to use her voice to make things better and **would love to stay in contact.**

(AZ-1 • Male • Lean Dem)

White male voter with two young children answered the door. **Was a supporter of Democrats**, however **thought they were weak.** He knew that **Trump and his agenda were not what he supported**, especially when **the ends do not justify the means.** He said the **border needs to change** but he **wouldn't do what Trump is doing.**

He said **he is a Democrat and will be voting Democrat in the future**, but **he feels the Democrats are weak in lots of ways.**He would not give his name or phone number to follow up after the visit, but **he appreciated us stopping by** to talk to him at length.

(OR-5 • 22 year old • Democrat • Lean Dem)

This person **was quiet and reticent to talk initially** and said that **he was not particularly politically engaged.**

He said that **he does not think the country is headed in the right direction.** He **does vote** and **thinks it is important.**

That opened a conversation about **science.** He said he is **studying to be a doctor** and spent the summer in a **lab at OHSU**, and saw how many people are **dedicated to accuracy and accountability.**

He expressed **sadness and concern** about **"opinion-based science"** and the **denigration of scientific knowledge** that has taken decades to develop.

He **thanked us for coming to the door** and said he is **open to further conversation.** We shook hands.

(OR-5 • 39 year old Male • Democrat • Strong Dem)

OK, I spoke to **[him]** and he said **right upfront that this was going to be a very negative conversation**, because he is **very opposed to what's happening.**

I asked him **if Trump were standing here, what would you say to him?** He said **"That would never happen. Trump doesn't care about anybody aside from the people he can use."**

He is **very committed to voting** because **he wants the country to go in the direction he believes it should go.** He said **in order for that to happen he needs to vote.**

He is a **social Democrat.** He **loves Bernie** and **felt that Democrats screwed Bernie.**

He **gave me his phone number** and said he was **open to follow up.** It was a **great conversation.**

(OR-5 • Female • Democrat)

I asked the voter whether she felt things were going in the right direction or wrong direction in our country. She said "a combination of both," then went on to say **she's seeing "a lot of lies and hate on social media" and feels things are getting worse.**

She said **the administration is handling immigration badly—"ripping people from their families without due process"—and that protecting reproductive rights is very important to her.**

She said **she feels like she's living in her "safe little bubble" and doesn't know how long that will last.** She described herself as a registered Democrat and frequent voter, and **said we were welcome to come back and knock again.**

Noticias Para Inmigrantes

WhatsApp Channels:

A Guide for Progressive Media & Nonprofits



PUBLISHED SEPTEMBER 2025

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Attribution & Disclaimer

This guide was created in collaboration with the **Higher Ground Institute, as part of the Media Innovation Fellowship**. Written and produced by Laura Liibbe, Director of Product, with experimentation and assistance on Noticias Para Inmigrantes WhatsApp channels from Rosella Valenzuela, Mitzi Lopez, Jessica DeJesus, Irene Velarde, Ha Na Park, and other members of plus más media.

It reflects not only the work of our team but also the insights generously shared by peers across the field. This work is meant to build on existing WhatsApp resources with Channels being a new, promising feature of WhatsApp (see Resources page). Input and feedback for this framework were provided by:

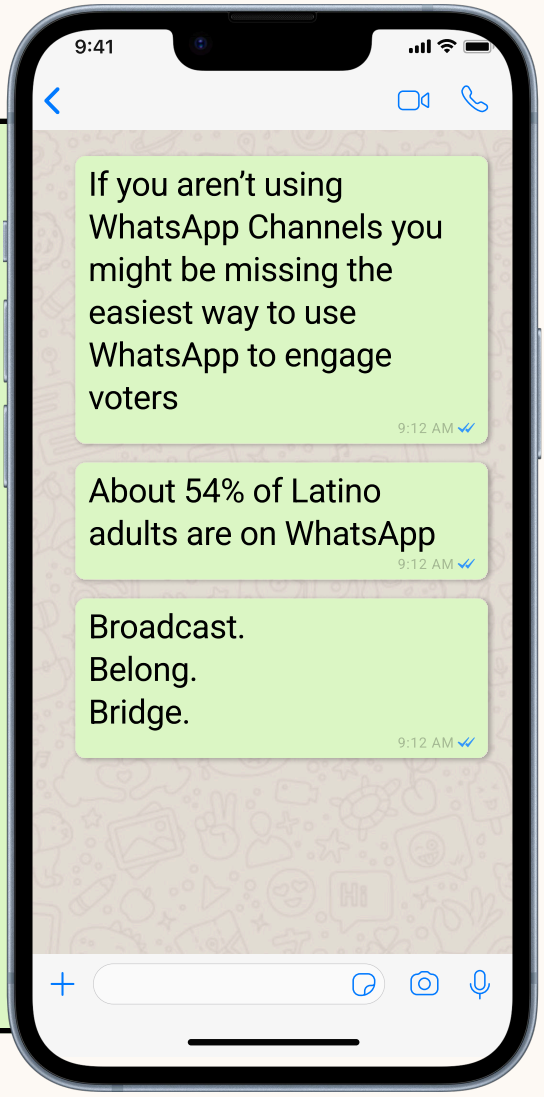
- Stephanie Valenzuela (Equis)
- Caitlin Jury (Equis)
- Roberta Braga (DDIA)
- Sylvia Salazar (Tono Latino)
- David Baum (DigiCanvas)

…and other organizers, researchers, and practitioners who contributed to the development of this playbook.

Disclaimer: WhatsApp is a constantly evolving platform, and features or functions may change at any time. For corrections or suggested edits to this guide, please contact editor@noticiasparainmigrantes.org.

If you would like to collaborate to utilize WhatsApp and reach Latinos in the U.S., please contact us at partnership@plusmasmedia.org.

This playbook is designed for **progressive organizations, campaigns, and media outlets** who want to reach Latino and immigrant communities where they already are: on WhatsApp.



It's a tested, strategic roadmap rooted in real experiments run by plus más media and partners, designed to help you:

- Deliver trusted, culturally grounded content in the language and formats people already use and love.
- Build an opt-in, high-engagement audience without relying on unstable algorithms or expensive ad spend.
- Shift from broadcast to relationship-driven communication: stay present in daily lives, activate your base when it matters, and move people into deeper engagement through groups or the WhatsApp API.
- Equip your organization with scalable tactics and frameworks that have been validated through early tests —showing what works, what fails, and what it costs.

By using this playbook, you'll gain the confidence to invest in WhatsApp strategies—especially for relational organizing—that move beyond SMS-style messaging, reduce costs per subscriber, and build lasting trust and impact.



Developed by plus más media with support from Accelerate Change, Inc. Special thanks to Rosella Valenzuela and Jessica DeJesus for their contributions in growing and testing the Noticias Para Inmgirantes WhatsApp channel.

Background & Introduction

WhatsApp Channels, launched globally in September 2023 after gradual testing earlier that summer, are a one-way, vertical communication tool designed for broad reach and efficient distribution. Located in the Updates tab—alongside statuses and stories but separate from personal chats, groups, and communities—channels give administrators a dedicated space to share information through text, polls, images, videos, documents, or voice files.

Unlike groups, where over-messaging risks user fatigue and often limits administrators to one summary message per day, channels allow for more frequent posting without overwhelming followers, since they live in a more discreet part of the app. A key technical distinction is privacy: channel followers' and administrators' phone numbers are never visible to one another, marking a major upgrade from groups and strengthening the trust and safety of this feature.

Key Distinctions:

1. *Privacy for followers and administrators*
2. *Frequent posting without user fatigue*



INTRODUCTION:

Why WhatsApp, Why Now?

- 100M+ U.S. users, half of Latinos use it daily.
- Unlike SMS, WhatsApp is free, multimedia, and trusted.
- Unlike social media, no algorithm hides your posts.
- Immigrant and multilingual communities already live here.

WhatsApp isn't SMS, it isn't social media, it's its own ecosystem. This playbook shows how to start with Channels, the easiest, most scalable entry point.

WHY START WITH CHANNELS?



- **Unlimited followers** (vs. groups capped at 1,024).
- **Free broadcast infrastructure,** costs nothing to scale.
- **Anonymous & safe:** followers are private, no spam fears.
- **Trust & visibility:** lives in the Updates tab.

Channels are the **simplest way for nonprofits to build presence** on WhatsApp, no extra tech, no barrier, no fees, just start broadcasting. WhatsApp can be confusing with its various features, here is a breakdown

HOW CHANNELS FIT INTO THE WHATSAPP ECOSYSTEM

- **Channels** = broadcast to thousands/millions.
- **Groups/Communities** = peer-to-peer trust, smaller spaces.
- **Individuals** = viral multiplier (forwards to family/friends).
- **Business API** = advanced automation, CRMs, costs attached.

Playbook principle: Start with a Channel → grow trust + reach → funnel into Groups or API if needed.

WhatsApp Channels Framework:

Broadcast. Belong. Bridge.

1. BROADCAST – DELIVER MESSAGES AT SCALE

- Channels are your always-on loudspeaker: once people opt-in, you can deliver messages at scale and at low cost—without fighting an algorithm.
- The key: choose a content niche that makes your channel worth following.
- Think easy, shareable content your audience wants to spread.

2. BELONG – NURTURE TRUST AND COMMUNITY

- Channels are present in your audience's daily feed, so you stay top-of-mind.
- You can use them to seed and grow groups, where real conversation and organizing happens.
- Channels = the heartbeat; groups = the circulation system.

3. BRIDGE – HACK YOUR WAY INTO DEEPER ENGAGEMENT

- Channels can drive people to message you first, lowering the cost of later API engagement.
- Instead of paying high per-conversation fees, you can use channels as the on-ramp to the API, only pulling people into flows when higher-touch interaction is needed.
- This makes channels a cost-effective bridge between mass reach and 1:1 engagement.



WhatsApp Channels aren't just a broadcast tool—they're your low-cost growth hack. With the right content niche, they let you scale messages, build groups, and funnel people into deeper engagement paths without burning budget.

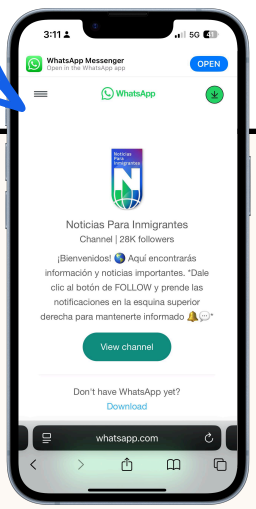
Growth Strategies for Channels

WEBSITE POPUPS/BANNERS

Full-screen popups mentioning to click “FOLLOW” convert best.

Note: The UX causes a drop off in conversions, the same link that will take you directly from SMS to WhatsApp will direct users to a landing page (image below) which users must then click through to go to the Channel and then click to follow the channel. This is due to the popup being in a browser, there's no current workaround.





Best Practice:
Add instructions to click follow on this landing page (it increases conversions!)



EMAIL & SMS CROSS-PROMOTION

SMS conversion ~4%, email lower. You could seed your Channel through your SMS list

Note: The UX ensures users must opt-in by clicking “Follow Channel”





COST EFFICIENCY

We achieved an average cost-per-click of **$0.15** driving traffic to the channel.

CONVERSION PERFORMANCE

Approximately **35% of those clicks converted into follows**.

BEST PRACTICE

Highlight content that reflects your channel's unique value. For conversion tracking, use the **"website visit" objective** rather than the built-in WhatsApp conversion option (which is for the WhatsApp API)

CLICKABLE IMAGES

Don't remove visuals, they boost click rate.

PARTNERSHIPS

Seed audiences through trusted organizations.



You can also seed Channels through other platforms, Facebook Pages, and social media, but keep in mind that not every audience member might have or use WhatsApp when you evaluate the success of each platform.

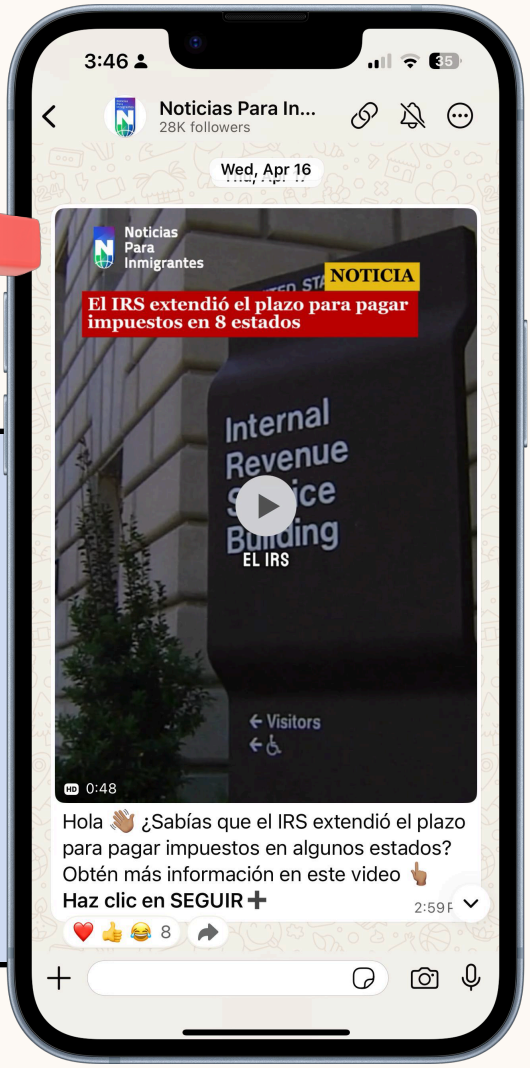
Experiment:

Adding “Haz click para seguir” During Ad Campaign

Over the course of one week, we ran a test to understand how a small change in messaging could influence channel growth. While running Instagram/Meta ads to drive new visitors, we added the phrase **“Haz click para seguir”** at the end of our most recent channel post. The goal was to make the next step obvious for people arriving on the channel for the first time.

We tracked **Reach** (the number of unique accounts exposed to our content) and **Followers** (the number of new people who subscribed after seeing the channel). During the test period, we observed a **21% uplift in the follow rate**, indicating that this simple call-to-action made it significantly more likely for visitors to convert into followers.

This experiment suggests that **clear, direct guidance in the channel’s latest message can increase follow-through from paid campaigns**, making it a low-effort, high-impact tactic for boosting audience growth.



21%

UPLIFT IN THE FOLLOW RATE

Content That Works on Channels

POSTING CADENCE:

3-5x per week is the sweet spot; **weekdays** best. Every audience is different so best to test this out for your audience!

FORMATS:

Polls (5% engagement) & Audio messages

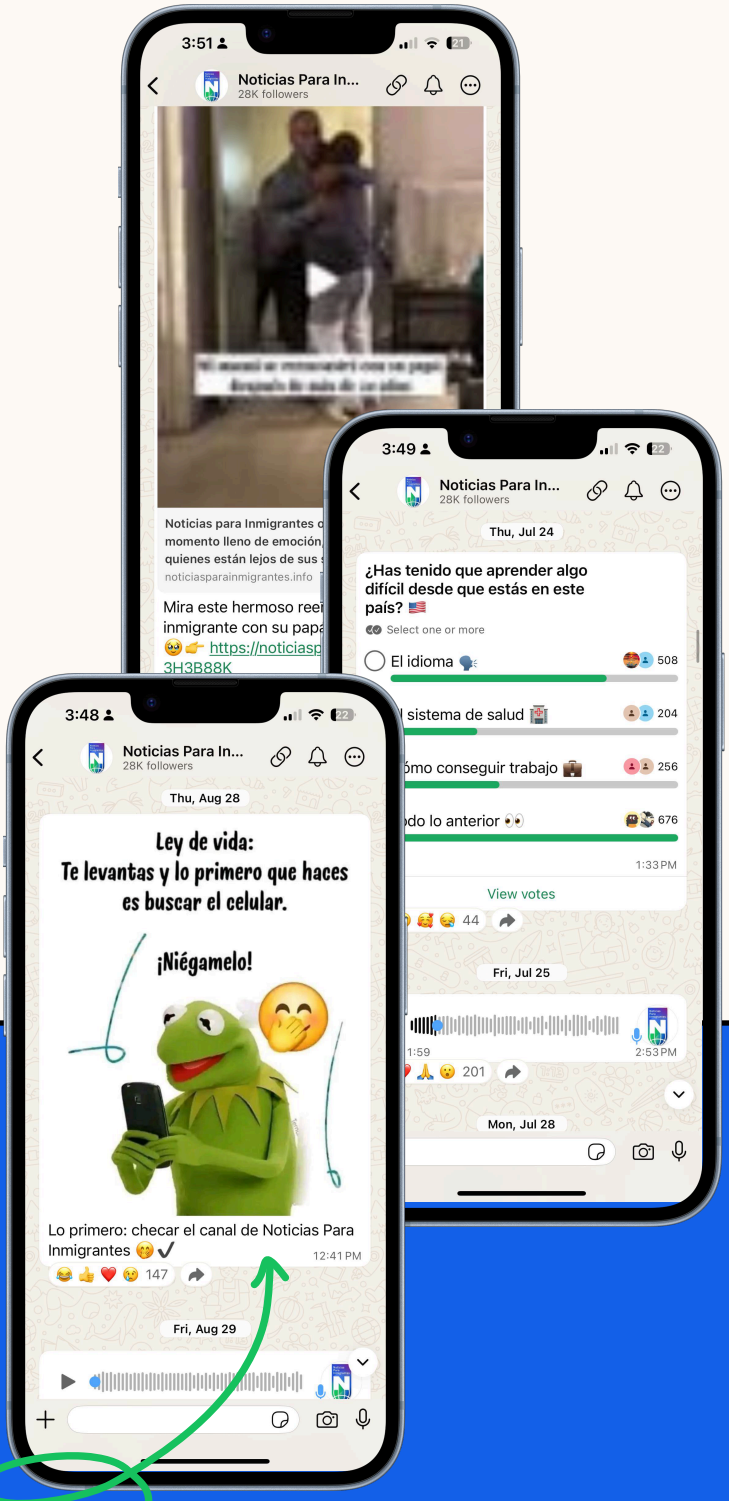
Note: Audio messages keep playing while navigating away from your channel, this is great for UX!

ARTICLES OR EXTERNAL LINKS:

1-3% engagement, measure with a url shortner like bit.ly; keep the attached clickable image- it increases click rate!

TONE:

Friendly, personal, informal.



PRO TIP:

When new users join they will see what the most recent content you posted is first, so keep showing up and keep in mind how your messages appear to a user and that they fit nicely on the screen.

Lots of images here!

Virality Experiment:

We explored whether content shared on our WhatsApp Channel could generate viral spread beyond our existing followers, and test if adding explicit calls-to-action would help us measure or amplify that effect.

INSIGHT

- We noticed early signs of virality when some links showed click-through rates above 100% of our follower base — a signal that people were likely sharing content outside the channel.
- This sparked interest in running dedicated experiments to understand if and how virality can be measured or influenced on WhatsApp.

EXPERIMENT SETUP

1. **Observation phase**: Monitored link performance and flagged instances where CTR exceeded follower count.
2. **Test approach:** Added a clear CTA in the latest posts asking followers to react with an emoji if they had shared the content.
3. **Tracking goal:** Use reactions as a proxy for share activity, since WhatsApp does not provide native analytics on shares. About 30% of those who take action react as well, use this as an estimate.



RESULTS

- Adding the CTA gave us some signal of sharing behavior, but the data was limited and not scalable.
- We did not find a reliable way to quantify virality within Channels.

TAKEAWAYS

- Virality is happening, but it's difficult to measure precisely due to platform constraints.
- Clear CTAs (e.g., "*Haz click para seguir*") are simple nudges that can increase visible engagement.
- Asking users to share drove fatigue (CTR drop from 5.3% → 1.7%, share rate 0.5%).
- Learning: Save share asks for high-value moments (e.g., partnerships).
- Practical approach: Rather than over-engineering measurement, assume that WhatsApp's design makes it a naturally viral environment — focus on creating content people want to share, even if exact share counts remain unknown.

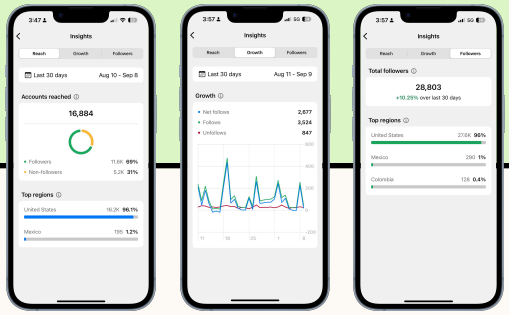
Data & Measurement on WhatsApp Channels

Data is very **limited and tricky** on WhatsApp Channels. Unlike the **WhatsApp Business API**, where you can segment audiences, track user journeys, and measure detailed engagement and retention within 1:1 conversations or automated flows, Channels provide only high-level insights. **Note:** you cannot filter by dates so it is recommended to collect data daily at the same time and input into a spreadsheet to track growth, unfollows, etc.

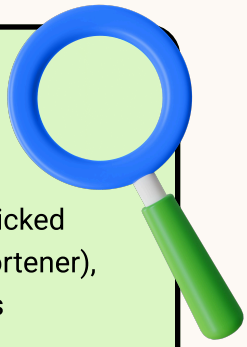
Currently, **only channel admins** have access to analytics, and the available data is limited to:

Available In-App:

- **Reach** – how many unique accounts saw your channel
- **Growth** – how many unique accounts followed and unfollowed your channel
- **Followers** - total number of followers and increase percentage; shows the top regions of your channel followers



Data you can track on your own:



- **Click Rates** – how many people clicked your link (use bit.ly or other url shortener), divided by the number of followers
- **Reactions per post** – number of emoji reactions from followers

There's **no way to track who exactly shared content, how far it spread, or the full downstream impact.** This means that measuring virality on Channels is inherently difficult, and strategies should focus on creating content that followers are motivated to share, trusting the platform's organic viral mechanics rather than relying on granular analytics.

BEST PRACTICE:

Quality > quantity: *Channel reads happen when people choose to check, not just when they get a push, we notice an increase in clicks on one external link over the course of multiple days, showing that users scroll back and forth to find what piques their interest.*



SCALING UP:

When to Add Groups or API

GROUPS:

good for onboarding & intimacy, but cap out at ~262K reach per account.

Total potential reach through groups (one account):

- 256 groups × 1,024 participants = **~262,000 people**.

This is your maximum ceiling if you're only using one business account and groups.

API:

powerful for automation, but costs money and has political restrictions.

BEST PATH:

Start Channels → Layer Groups (for trust) **→ Add API** (for automation) **for specific engagements and call to actions**





Action Taking on WhatsApp Channels

In a recent test, we added a **petition link** to a channel post to measure how effective Channels could be for driving downstream actions. The results showed a **1% click-through rate**, and notably, **70% of those who clicked went on to complete the petition**.

This early signal suggests that **Channels have real potential for action-oriented asks like voter registration**. While direct measurement of shares isn't available on Channels, the high conversion rate indicates that audiences are willing to take meaningful action once they click through.

We'll continue to **experiment with action-based calls-to-action (CTAs)** and run these tests in parallel with the **WhatsApp Business API** to refine messaging, improve tracking, and explore how to **leverage friend-to-friend sharing to scale impact**.



CONCLUSION:

Start Simple, Scale Smart

If nonprofits don't organize on WhatsApp, others will. Channels are the on-ramp: free, scalable, easy. Start here, learn, and then decide whether to layer in Groups or API.

YOUR NEXT STEP:

Create a Channel today. Post once. Share the link with your community. See what happens.

STAFFING:

What Does a Sustainable Workflow Look Like?

Practitioners often ask: "How much time and staff do we need to run this well?"

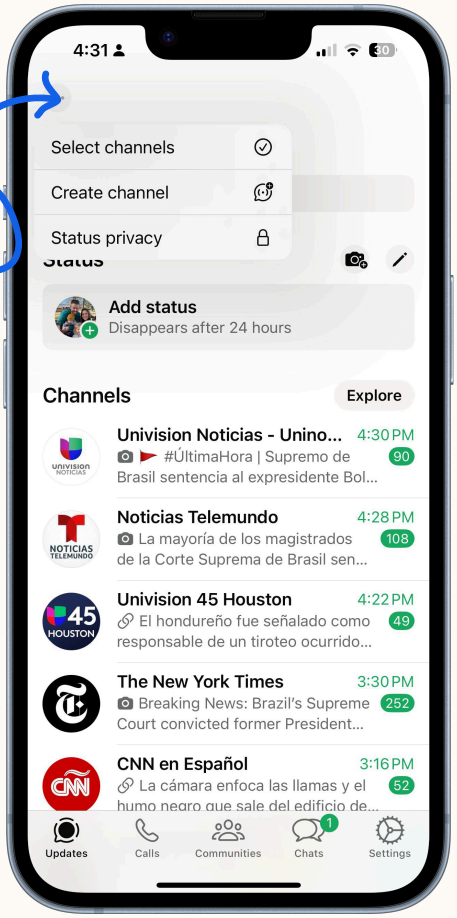
From our early experience:

- **Content creation:** 3–5 posts per week takes ~4–6 hours total, especially if you adapt existing content into WhatsApp-friendly formats (short text, images, polls, voice notes).
- **Community management:** Groups require more staff attention—expect at least 5–10 hours per week per active group to answer questions, moderate, and foster trust.
- **Data tracking & reporting:** Dedicate ~2–3 hours weekly to logging reach/follow/unfollow data and monitoring click-throughs.
- **Overall staffing:** A small org could start with 0.25–0.5 FTE (one person dedicating part of their role), then scale up as groups and API use grow.

The key is to **start lean**: one person can launch and maintain a Channel, then you can add capacity as engagement deepens.

How to Get Started with WhatsApp Channels

Launching a WhatsApp Channel is simpler than you might think. Below is a step-by-step guide to get your organization up and running—plus tips to avoid common pitfalls.

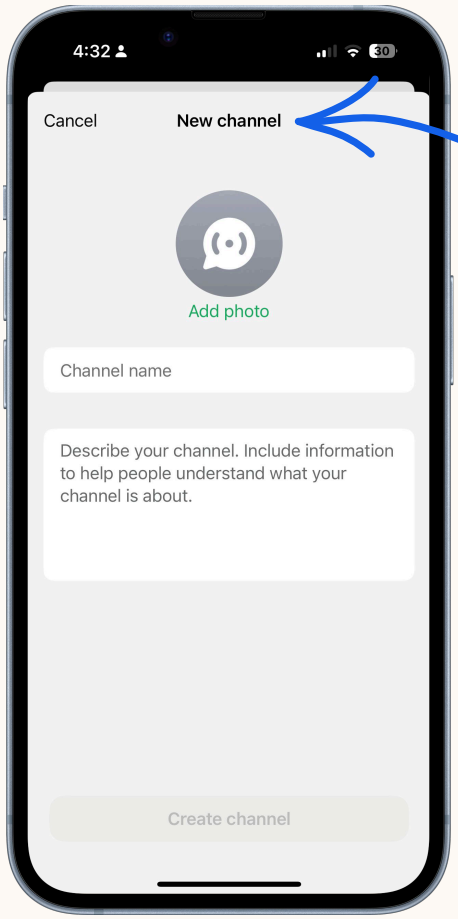


STEP 1:

UPDATE YOUR WHATSAPP APP

(YES, YOU WILL NEED THE APP!)

- Make sure you're using the latest version of WhatsApp (iOS or Android).
- Channels live in the "Updates" tab (next to "Chats"):



STEP 2:

CREATE YOUR CHANNEL

1. Go to Updates → "+" → New channel.
2. Choose your Channel name (keep it short and clear—think brand name or campaign).
3. Add a Channel description that explains what followers will get.
4. Upload a profile photo (use your logo or a recognizable image).

STEP 3:

START POSTING!

STEP 4:

SHARE YOUR CHANNEL LINK

- After creating your Channel, you'll get a unique link in the top right.
- Share it via:
  - Website popups or banners
  - SMS & email lists
  - Social media posts (Facebook, Instagram, Twitter/X)

TIP:

Always add "Click Follow" instructions, since people must tap the follow button inside WhatsApp after they open the link.

STEP 5:

ESTABLISH A SIMPLE CADENCE

- Aim for 3–5 posts per week to stay top-of-mind.
- Mix formats: polls, images, short text, voice notes.
  - Example content calendar:
    - Monday post an article with an audio explainer so you can gauge clicks for an engagement metric,
    - Wednesday post a meme or an image,
    - Friday post a poll that creates community interest.
- Keep experimenting—track what gets the most reactions and clicks.

Want to Reach Audiences on WhatsApp?

If your organization is looking to connect with Latino audiences through **trusted messengers who are already building on WhatsApp**, we'd love to collaborate.

Partner with plus más media to scale your reach and impact.

CONNECT WITH US

Resources & Further Reading

Equis Resource Library for WhatsApp

Equis Full WhatsApp Guide for Organizing (no Channels):

Guide for Organizing with WhatsApp_External.docx

Blueprints for Change: WhatsApp Uses for Campaigns:

WhatsApp uses for campaigning

Continued Reading:

1. WhatsApp: The Widespread Use of WhatsApp in Political Campaigning in the Global South
2. How 13 news publishers are using WhatsApp Channels
3. Independent digital media in Latin America explore WhatsApp channels despite problems obtaining verification from the app
4. NY Times: In India, Facebook's WhatsApp Plays Central Role in Elections



Get Off of Instagram: The Playbook for Driving Offline Political Action with Chatbots

BEST PRACTICES FOR POLITICS & ADVOCACY

GABRIELLA ZUTRAU

DIGITAL STRATEGY ADVISOR &
MEDIA INNOVATION FELLOW
HIGHER GROUND INSTITUTE



Hi, I'm Gabbi Zutrau

DIGITAL STRATEGY ADVISOR TO CAMPAIGNS AND ORGANIZATIONS

ZOHRAN FOR NEW YORK CITY · MOVEON · STOP AAPI HATE · fwd.us · Julia Salazar FOR STATE SENATE



More info at zutrau.nyc

Also, throughout this playbook, we'll use examples from my dog's chatbot account, as well as her Instagram page @ednatherunt



Using This Playbook

The following slides outline reccomendations for social media chatbot usage in politics and advocacy contexts. While this broad strategic advice can be applied using many different chatbots, all examples are based on the use of Manychat. All appendices (slides 14-26) outline specific uses, limitations, and technical instructions for using Manychat.

If you'd like to try a social chatbot, you can try a free month of Manychat Pro by scanning this QR code, and entering discount code 'EDNA' when you sign up.

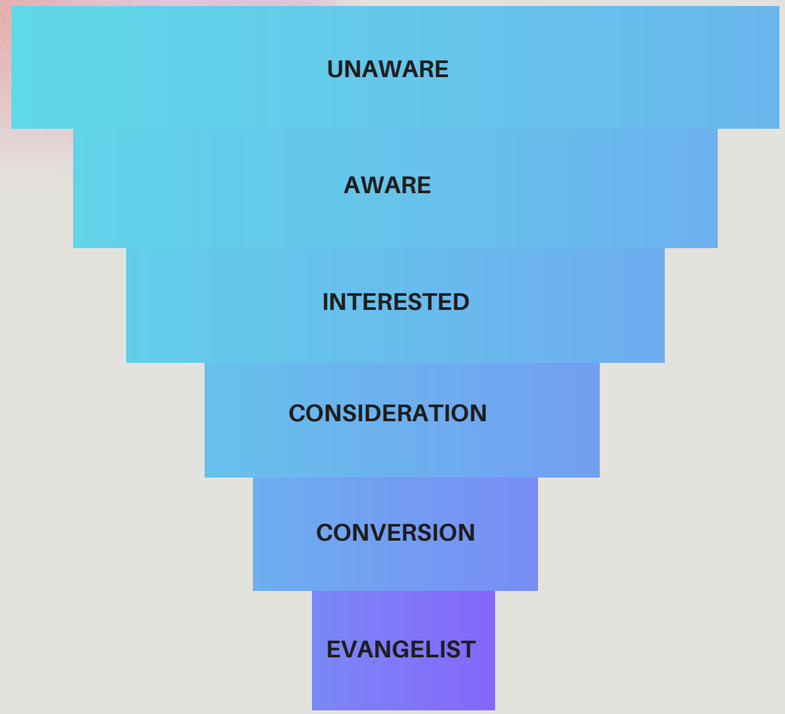
Table of Contents

Slide 1: Title
Slide 2: Personal intro
Slide 3: You are here
Slide 4-5: The organizing problem & solution
Slide 6: About social chatbots
Slide 7: Case study
Slide 8: Reccomended flows
Slide 9-12: Building flows and picking triggers
Slide 12: Best practices and testing
Slide 13: Common pitfalls
Slide 14: Getting started
Slide 15-26: Resources and appendices

WIth any questions or comments about the content in this playbook, please feel free to email hi@zutrau.nyc

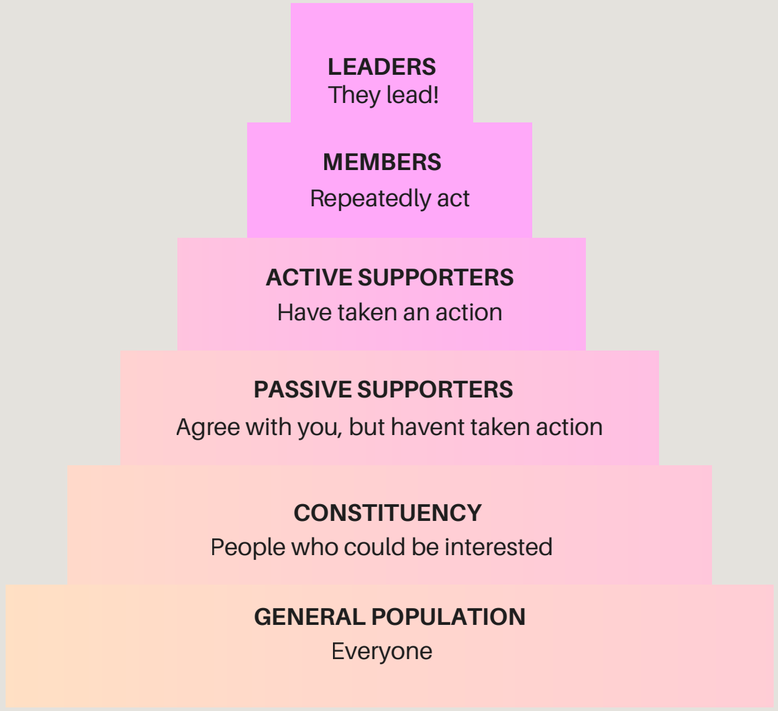
The Problem

MARKETING



FUNNEL

ORGANIZING



LADDER OF ENGAGEMENT

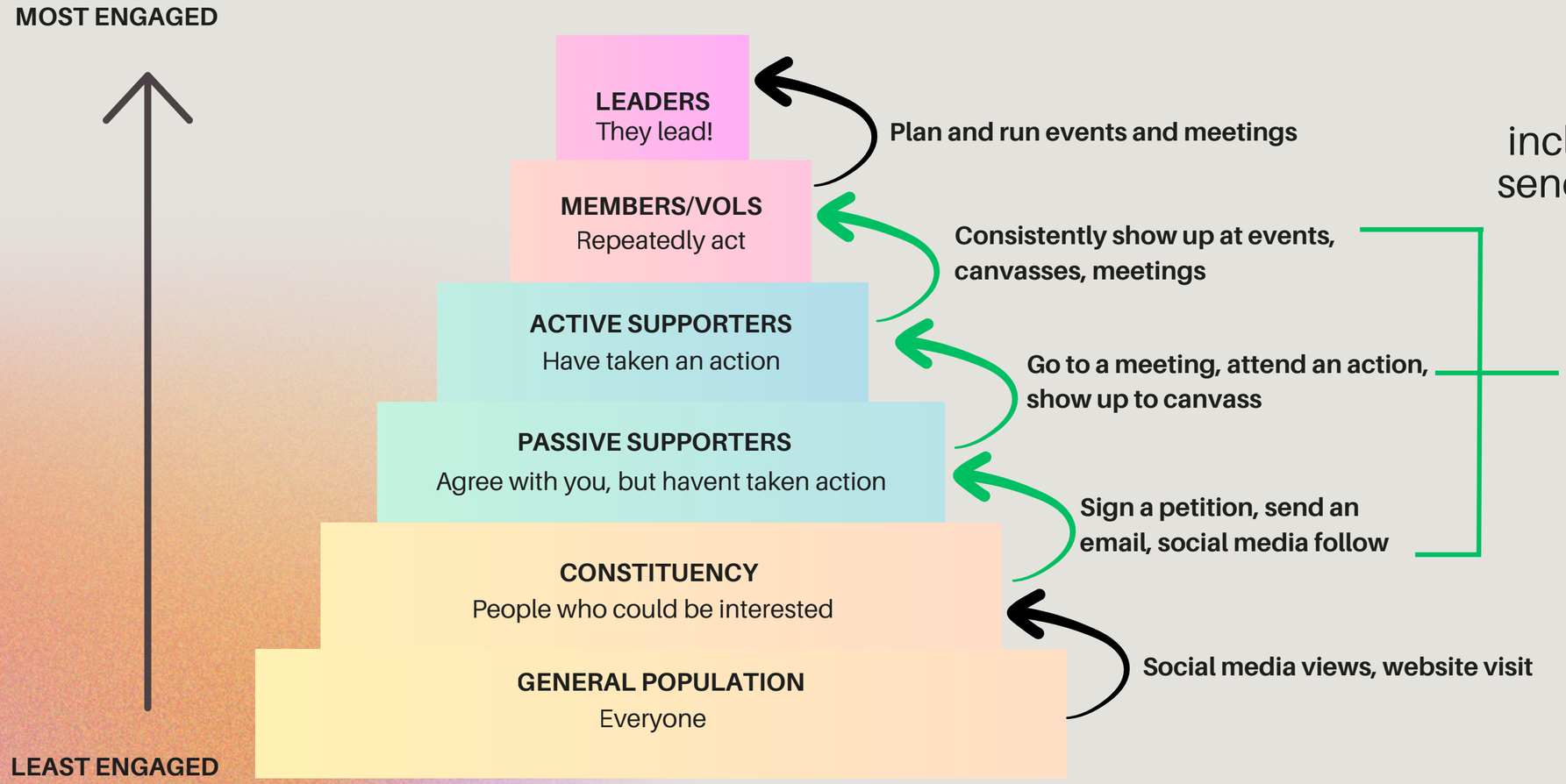
When it comes to organic social media, getting people off of Instagram and turning them into petition signers, volunteers, donors, and voters has always been a particular challenge, because the app doesn't have clickable links in captions.

In marketing terms, it’s always been tough to convert people from Instagram.

In organiziing, it’s important that we collect people’s emails so that we can re-contact them again and again to make escalating asks, and develop their leadership by bringing them up our ladder of engagement

Organizing Ladder of Engagement

FROM INSTAGRAM TO ACTION AND DEEPER COMMITMENT



Collecting people's contact information from Instagram has always been tough, because getting people off-platform has meant asking them to go find your link in bio, which often feels high-friction to users, resulting in significant drop-off, and low click-through rates.

Often, staff are given the task of community management, which includes responding to messages, and sending call to action links in DMs. This can be very labor intensive.

But with social media chatbots, we can bring people up our ladder of engagement in a way that is lower-friction, and reduces drudge work with automation.

Using bots, we can make low-lift asks, then eventually higher lift asks, and encourage people to take action again and again at increasing levels of buy-in.

Social Media Chat Bots

“Comment [keyword] and we’ll DM you the link”

Customers.ai

Caucus

Manychat

chatfuel

OAK

Amplify.ai
BY TRILLER

There are many different chatbots that can respond to keywords with direct messages. A few examples are listed here.

This Playbook focuses on Manychat, but they all have their benefits and trade offs. Some are cheaper, some have generative AI features, some offer tagging and segmentation, and so on.

If you’d like to give a chatbot a try, see slide 3 for information on trying a free month of Manychat Pro.

Manychat as an Organizing Tool

ZOHRAN FOR NYC CASE STUDY
APRIL-JUNE 2025

In 2 months:

- Sent over 77,000 automated direct messages on Instagram
- Generated over 21,000 clicks from DMs
- 3,500+ emails collected directly in DMs
- Cost: $318
- CPA: $0.03

Bot Flows

The 4 core flows that should be implemented on Instagram accounts focused on politics and advocacy. The goal is to increase points of contact, click-throughs, and conversions, while limiting spammyness by not sending unwanted or repetitive messages,

1. Comment-to-DM

Automatically send links:
“Comment [keyword] and we’ll send you the link”

2. Default Reply

Reply to every direct message:
“Thanks for your message! We read as many DMs as we can…”

3. Story Mention Reply

Reply every time someone tags you in a story:
“Thanks for the mention! We wanted to follow up…”

4. Secondary Email Collection Flow

Automatically collect emails without asking people to leave IG:
“Just type in your email below?”



An example of what a complex flow build can look like. But don’t worry, we’ll start much smaller.

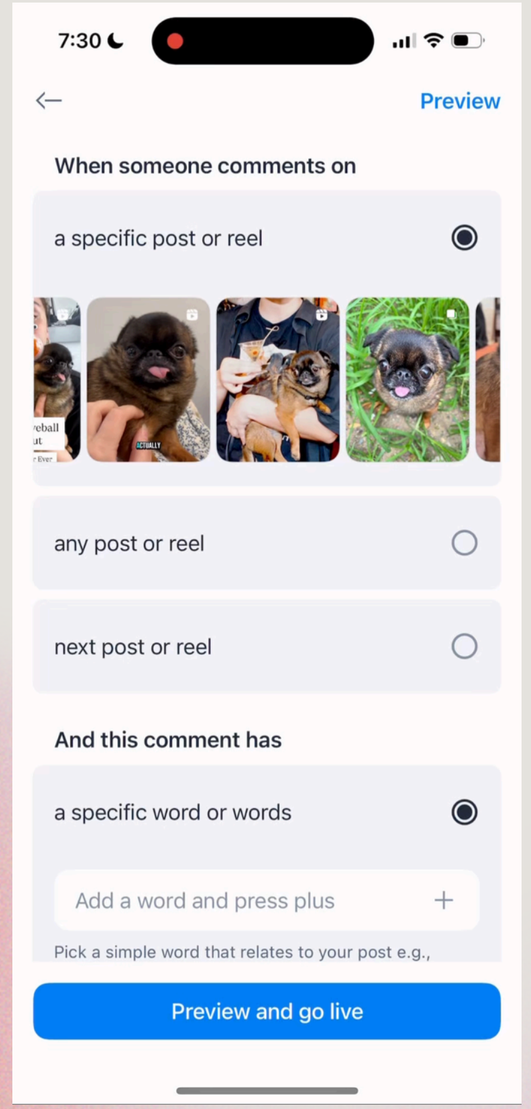
Comment-to-DM Flows

1

Quick Automation

Automatically send links:
“Comment [keyword] and we’ll send you the link”

- **Most common Manychat flow**
- **Better than “link in bio”**
  - **More algorithm friendly**
  - **User can revisit CTA later**
- **Average click through rate: 65%**
- **Up to a 98% click through rate**

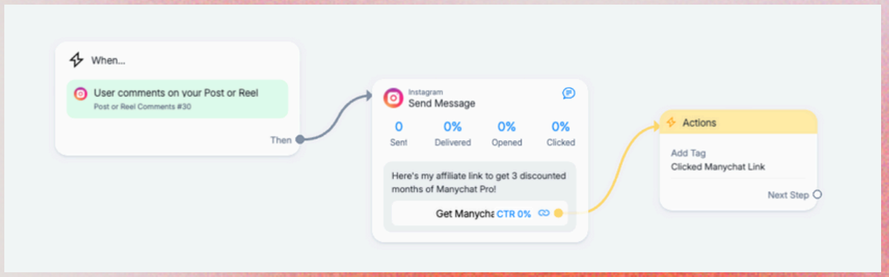


<u>Can be built as “Quick Automation,” but building from scratch in the visual flow builder can provide more data</u>

See appendices 1, 2, and 3 for more information on how to build these flows, and when and where to add tags.

2

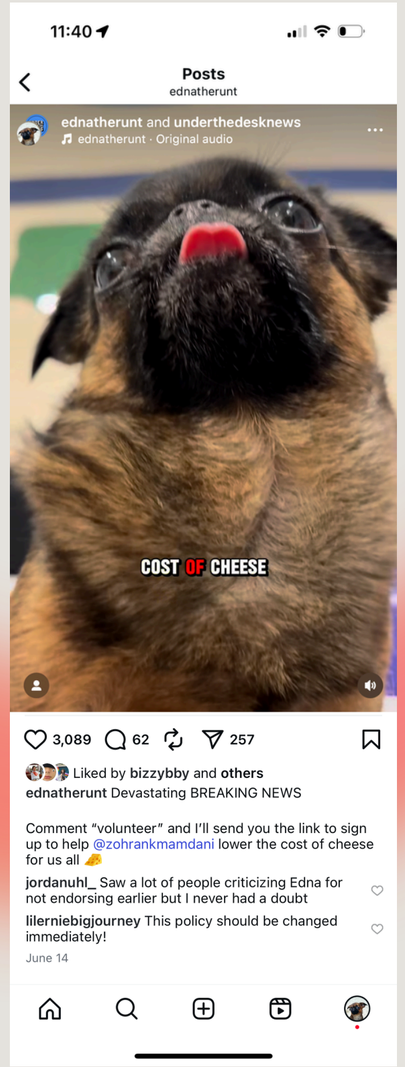
Visual Flow Builder



Triggers for Comment-to-DM flows

What makes a good trigger?

- Simple and short, to decrease chance of typos. Generally keep triggers to 2 words.
- Combine words to avoid accidental triggers
  - Especially for “always-on” triggers
  - Examples: CanvassNow, NoWar, ReadMore, VoteToday, SignLetter
- For one-word triggers, only apply them to one post. One-word triggers that are always on can easily be accidentally triggered, leading to spammy messages.
- Give additional context when you can: “Comment “DonateNow” (one word, no spaces), and we’ll message you the link.”
- Not case sensitive, but capitalize words for legibility when combining words.



Comment “volunteer” and I’ll send you the link to sign up to help @zohrankmamdani lower the cost of cheese for us all

Bot Flows

1. Comment-to-DM

Automatically send links:
“Comment [keyword] and we’ll send you the link”

2. Default Reply

Reply to every direct message:
“Thanks for your message! We read as many DMs as we can...”

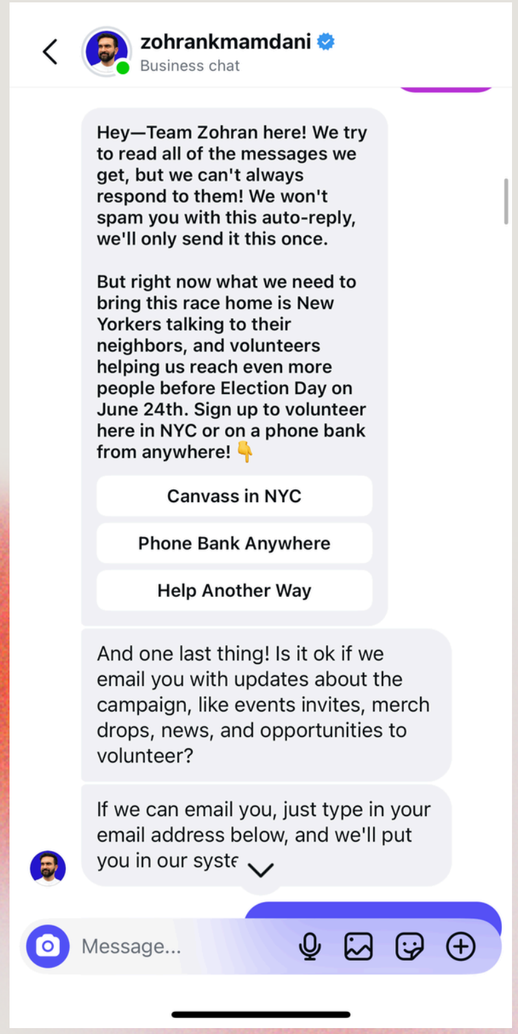
3. Story Mention Reply

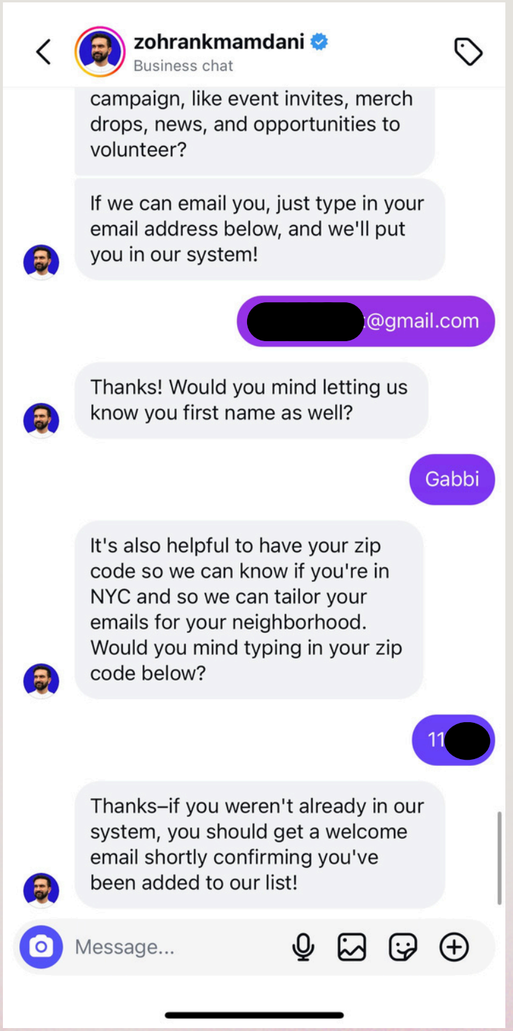
Reply every time someone tags you in a story:
“Thanks for the mention! We wanted to follow up...”

4. Secondary Email Collection Flow

Automatically collect emails without asking people to leave IG:
“Just type in your email below?”

Up next: building these complex flows

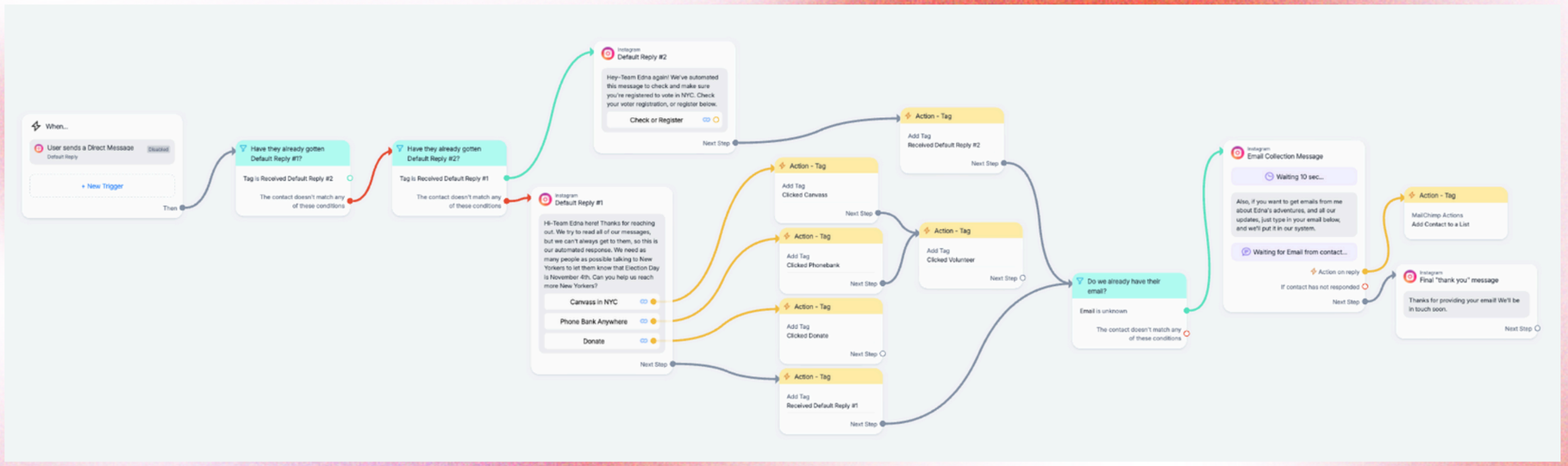




Best Practices for Complex Flows

- Don’t try to hide that it’s an automation
- Don’t spam people with unneeded, unwanted, or repetitive messages
- Collect data through tagging (a lot)
- Tailor messages for different segments, and customize experience using conditions
- Always test flows before they go public

For all context and technical information on how to build this flow, see appendices 7, and 8A-8D



Test your flows:

1. Use a different account to trigger the flow. This is the most surefire way to ensure your flow works.

2. Test with the preview feature inside of Manychat before turning it on

Common Pitfalls

1. Meta limits what can be sent to users. Unless a user messages you first, or until a user messages you back, your account can only send one message to a user *per flow*. This often causes confusion when setting up and saving certain flows. See appendix 4 for more information about this common issue.

2. Do not turn on automatic likes. Many bots offer a feature that automatically likes all comments or messages. As political accounts often receive inflammatory or negative messages, it is best to leave this feature *off.*

3. When using an email collection flow, make sure a welcome email is turned on in your CRM. When users hand their contact information over to a bot, it's ideal to connect the dots from Instagram over to their inbox, so they know what's been done with their data. Sending an immediate welcome email can help built trust.

4. Test after every edit. Even the smallest tweak can change whether or not your flow works. Ensure functionality by previewing your flow before it goes live, **and** by testing it from a second Instagram account before the flow is publicized.



Getting Started

How to get your team to say yes to implementing a chatbot

1. Generally encourage and emphasize a culture of experimentation

2. Prepare to go viral. Set up your automations so you're ready for a high volume of interactions and you don't miss out.

3. Emphasize that if used correctly, chatbots take work off of your plate

4. Highlight that the more you use it, the lower your CPA. It can easily pay for itself.

5. Your first month is free if you use code EDNA at my affiliate link: *https://manychat.partnerlinks.io/Zutrau* or just scan here →

QUESTIONS?

email hi@zutrau.nyc or



Sign up to get email updates from me.

Appendix 1

Comment-to-DM Flow

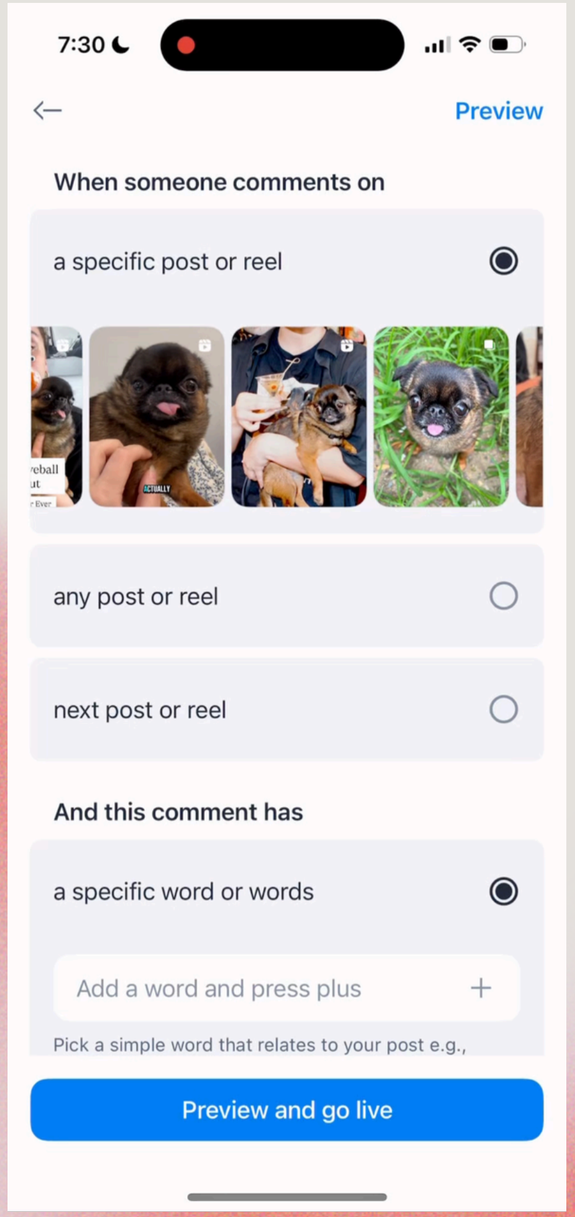
Setting up a Comment-to-DM flow as a quick autoamtion

The fastest way to set up a comment-to-DM flow is to set up a “quick automation.”

Simply pick which posts you want the flow to apply to: a specific post that’s already live, the next upcoming post that has yet to go live, or all of your posts.

Then fill out each field with the keywords you’d like to use as a trigger and with the content you’d ilke to send as a response.

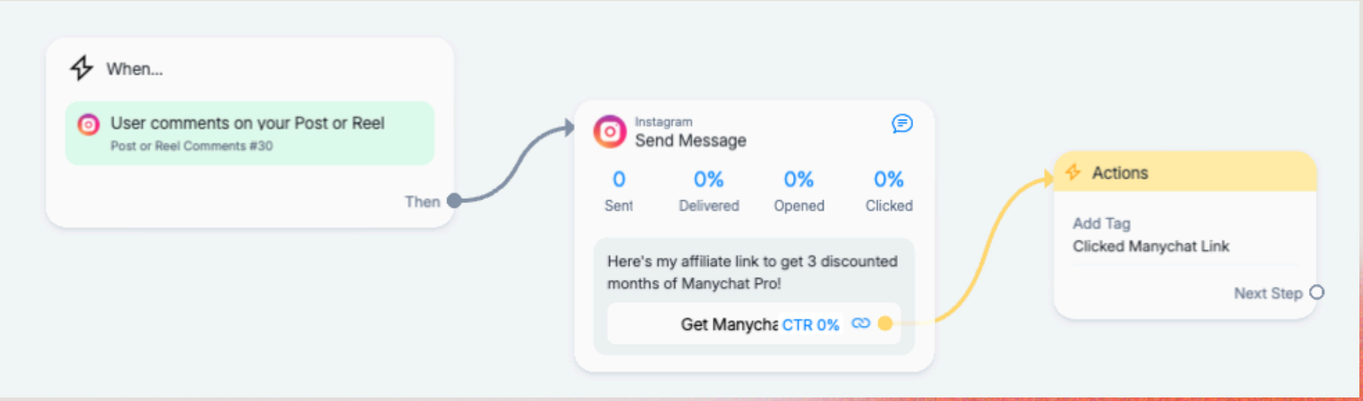
Next we’ll build a comment-to-DM flow in the visual flow builder, but first, we’ll go over some terms...



Appendix 2

Comment-to-DM Flow

Setting up a comment-to-DM flow in the visual flow builder



Use the visual flowbuilder to ensure that your contacts recieve tags so that you can send them more tailored messages later on, based on their actions or on messages you've sent them.

To build a flow in the visual flow builder, go to the Automations tab in Manychat, hit the "New Automation" button in the upper right hand corner, then hit the "Start from Scratch" button, and choose "Start with Blank" from the drop down.

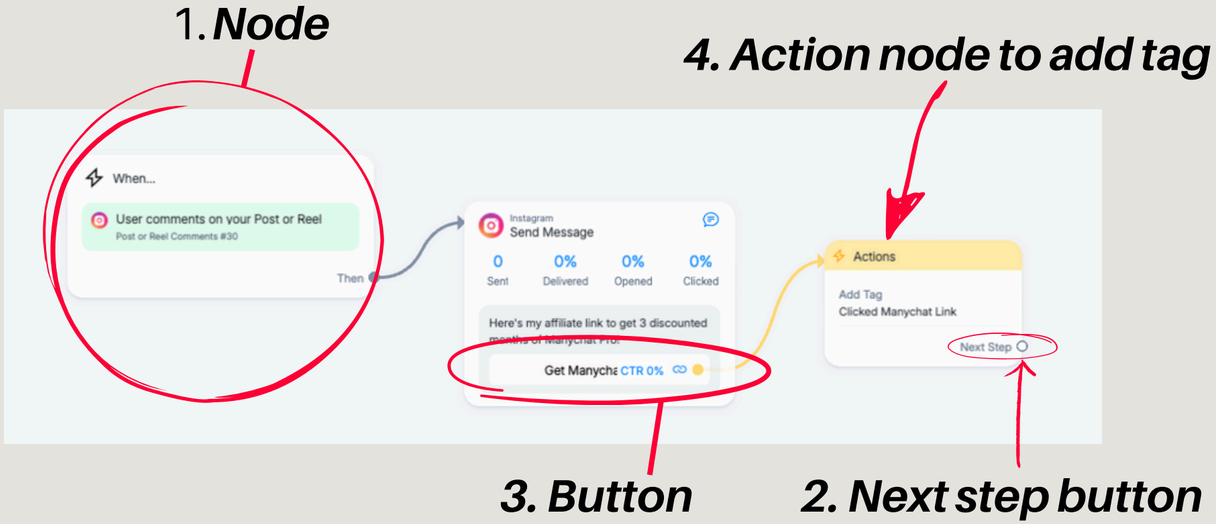
Once you've entered the visual flow builder, pick the trigger "user comments on a post or reel" and add the keywords that will trigger your flow. Then add your content to the second node, including any links.

To add a tag, choose "+ Actions" from the drop down menu. Then hit the "+ Action" button in the action note, and choose "Add Tag" as your action. Then pick the tag you'd like to add from your list of tags, or create a new tag by typing in the name of the tag, and hitting the + sign below.

To add a conditional as a step, simply hit the "+ Condition" and pick the conditions you'd like the bot to look for, like "contact has tag 'clicked volunteer'" or "user has over 20,000 followers" or "user follows your Instagram account."

Appendix 3

Building & Using Tags



Things to note before you start building complex flows

1. Each step of your flow will be contained in a rectangular block, called a **node**.

2. You can add steps in a flow by clicking the **next step button**, and holding the click into the empty space next to your last node. The lines that connect your steps can be deleted by hovering over them, and hitting the trashcan logo.

3. You can add up to 3 **buttons** to your nodes, linking out to websites. You can also add "quick replies" to your node, which look similar to buttons, but when the user clicks a "quick reply," it will appear and send as a reply from their account. Such a reply can trigger the next step of your flow.

4. As a step in your flow, you can add **tags** and conditions, to tag users as having recieved certain messages, and then to only send them specific messages under certain conditions.

Examples of tags you can add to contacts who engage with your bot: *"clicked volunteer," "NYC-based," "Influencer," "Recieved Default Reply #1."*

Example condition steps you can add to your flow:

"If contact has recieved default reply #1, send them default reply #2"

"If contact has over 20,000 followers, send them message 1. Otherwise, send them message 2."

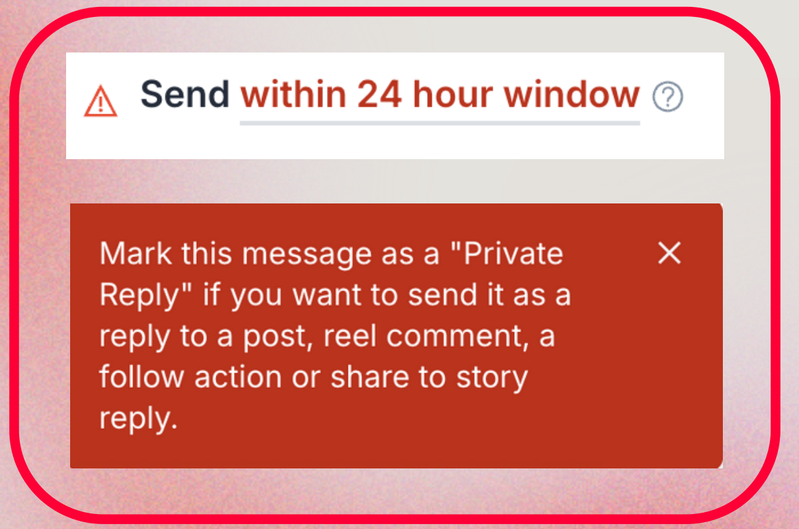
Appendix 4

Meta Limitations

Why you may see an error message when building a flow



- Meta has parameters in place that protect its users from spam. One of these parameters will prevent your account from sending users multiple messages until they send you one back.
- If a user messages you first, this issue won't arise, since the user has indicated they want to have a direct messaging relationship with you.
- To get around this, and to be able to send multiple messages with one flow, one after another, you can set up an "opening message" that includes a "quick reply" button. This is a pre-written reply, which the user can simply tap in order to send the reply. This quick reply will consitute proof to Meta's system that you are not spamming their inbox.
- If you try to set up a multi-message flow with no "opening message," you will get these confusing error messages.



If the goal of your call to action is simply to achieve as many click-throughs as possible, skip the"opening message," as including one will increase friction for the user by adding steps to the process of getting to their destination, and you will see lower click-throughs because of it.

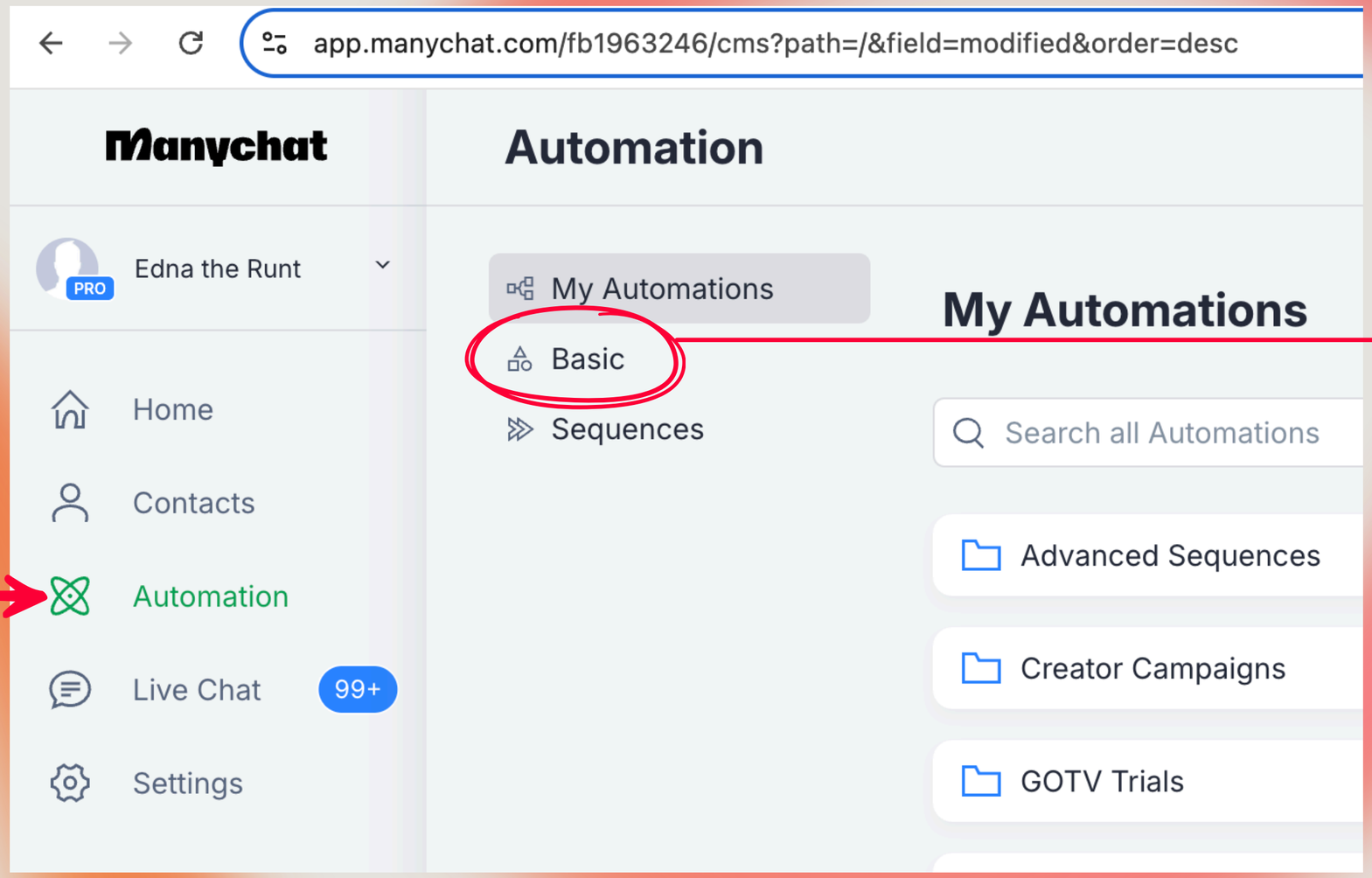
Appendix 5

Building Complex Flows

Build default reply and story mention reply flows so that everyone who messages you or tags you in a story is responded to with actionable ways to support you.

Go to your automations tab, and navagate to the Basic automations section.

Automations Tab

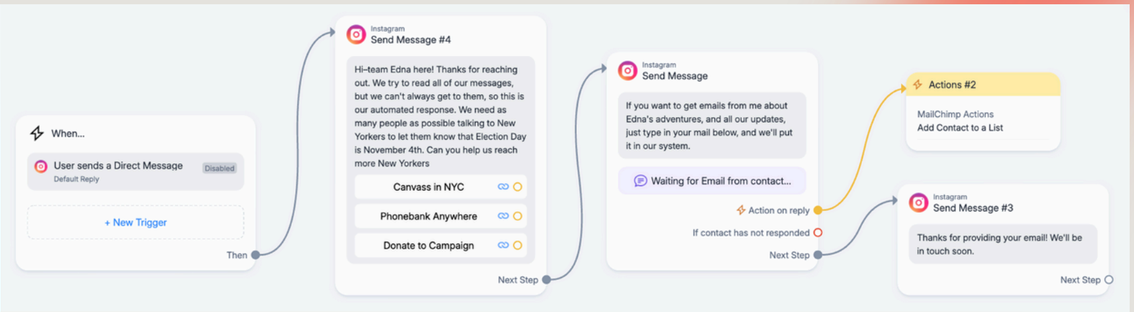


Your **basic** automations

Appendix 6

Building Complex Flows

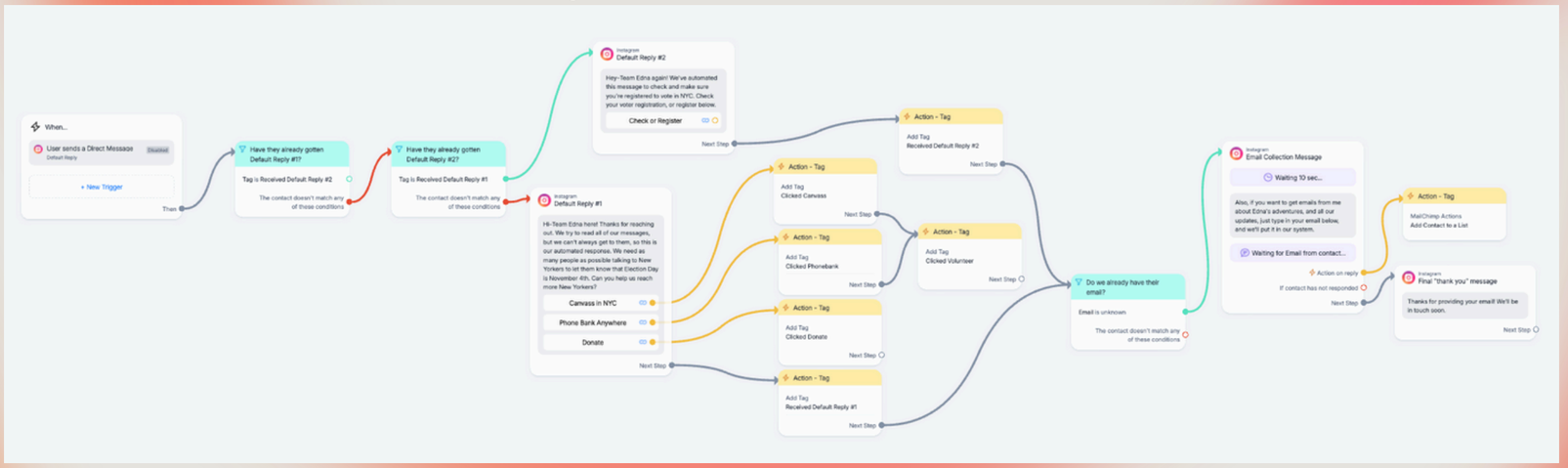
The basic outline



When responding to all messages, there are important steps you should take to build trust through this touchpoint with your audience, rather than sending messages that feel like spam to users.

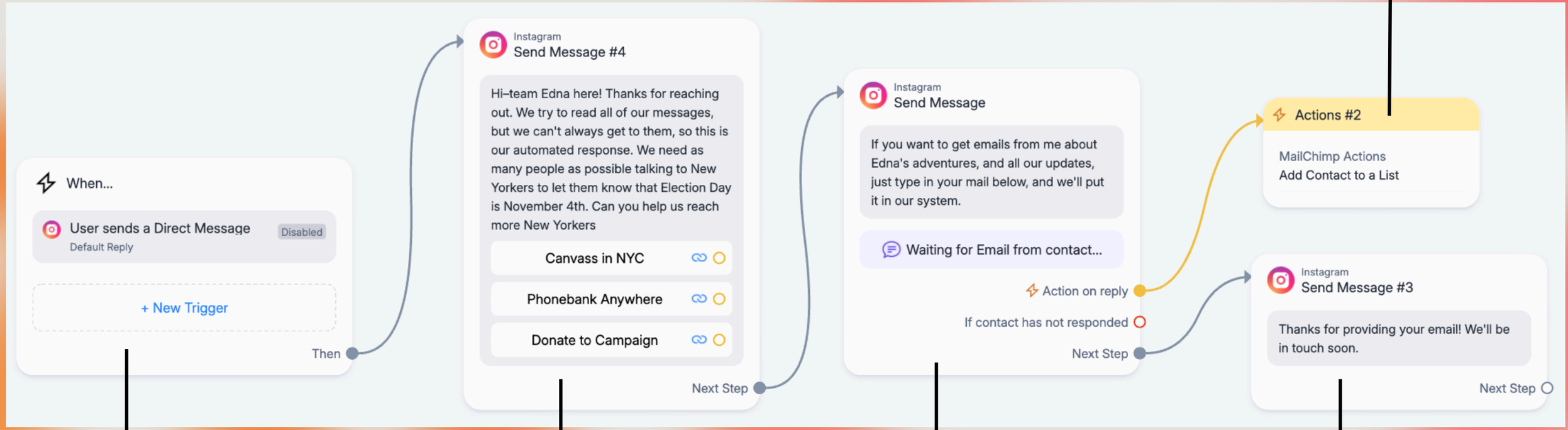
Adding tags and conditions to you flow is key for ensuring you're not sending unnecessary or repetitive messages to people. Ensuring that users only recieve valuable messages from you is important for making sure your most enthusiatic followers don't get turned off from messaging you.

The final flow



Appendix 7

Basic Outline of a Default Reply + Email Collection Flow



Action node: collecting the email address they typed out, and transferring it directly to your CRM of Google sheet

Trigger: user sends message

First message: acknowledge this is an automated message and offer a few ways to engage

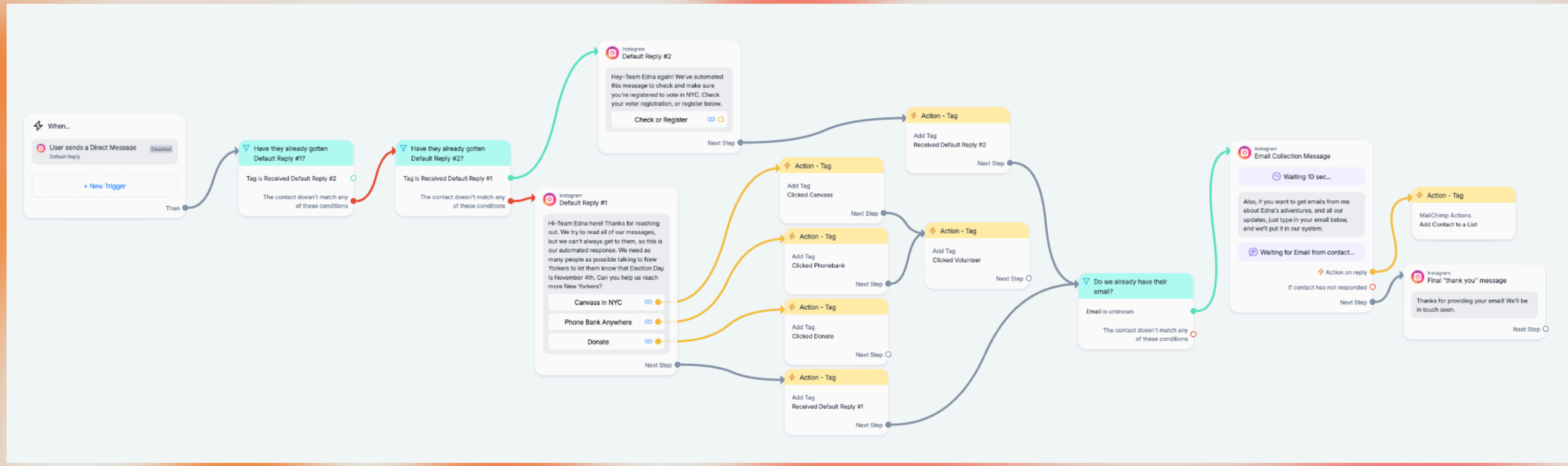
Second Message: ask contact to type their email address out inthe chat

Third message: a thank you message letting the user know you've collected their email

Appendix 8A

Building Complex Flows

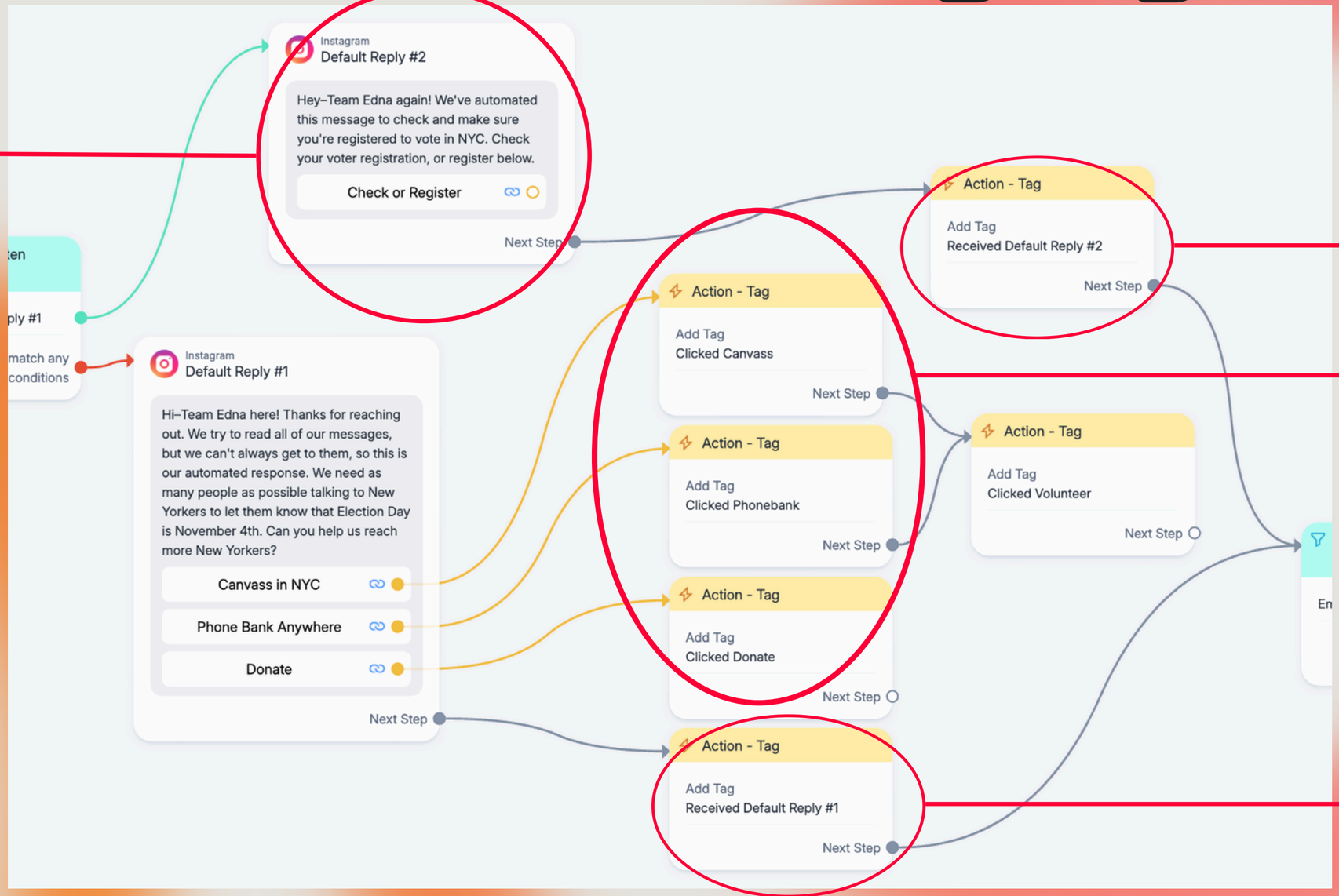
There are several locations in the flow that additional nodes can be added to decrease spammyness, and increase efficacy. We'll look at the flow up-close in a few different chunks. We'll start with the middle chunk, since our initial conditions are based on which of these tags contacts have received.



Appendix 8B

The Middle Chunk: Adding Tags

A secondary Default Reply, so if users message you more than once, they'll get this other message and be offered more ways to engage.



Tags the user as having received Default Reply #2

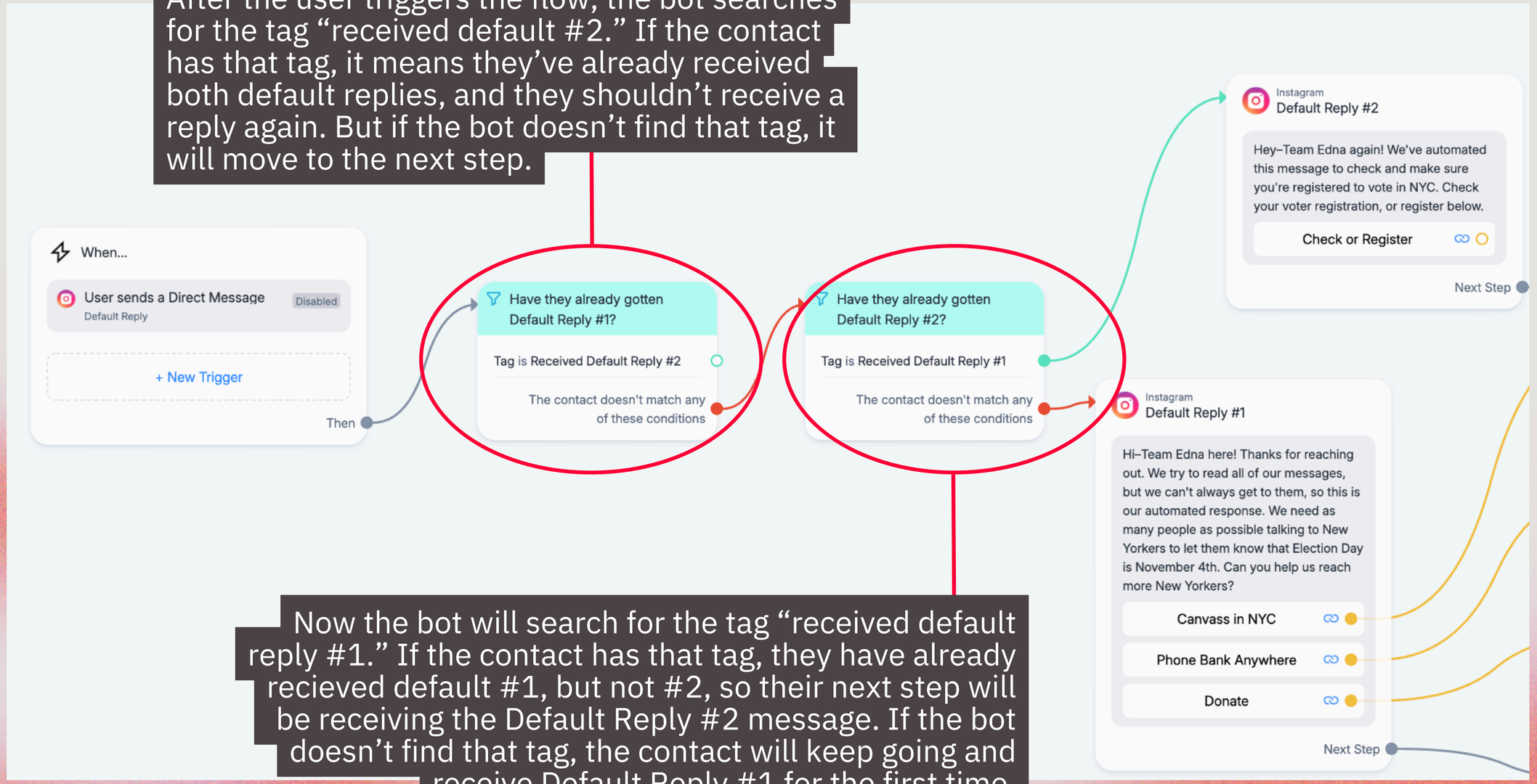
Tags the user if they click specific buttons

Tags the user as having received Default Reply #1

Appendix 8C

The Beginning: Sending the Right Message

After the user triggers the flow, the bot searches for the tag “received default #2.” If the contact has that tag, it means they’ve already received both default replies, and they shouldn’t receive a reply again. But if the bot doesn’t find that tag, it will move to the next step.

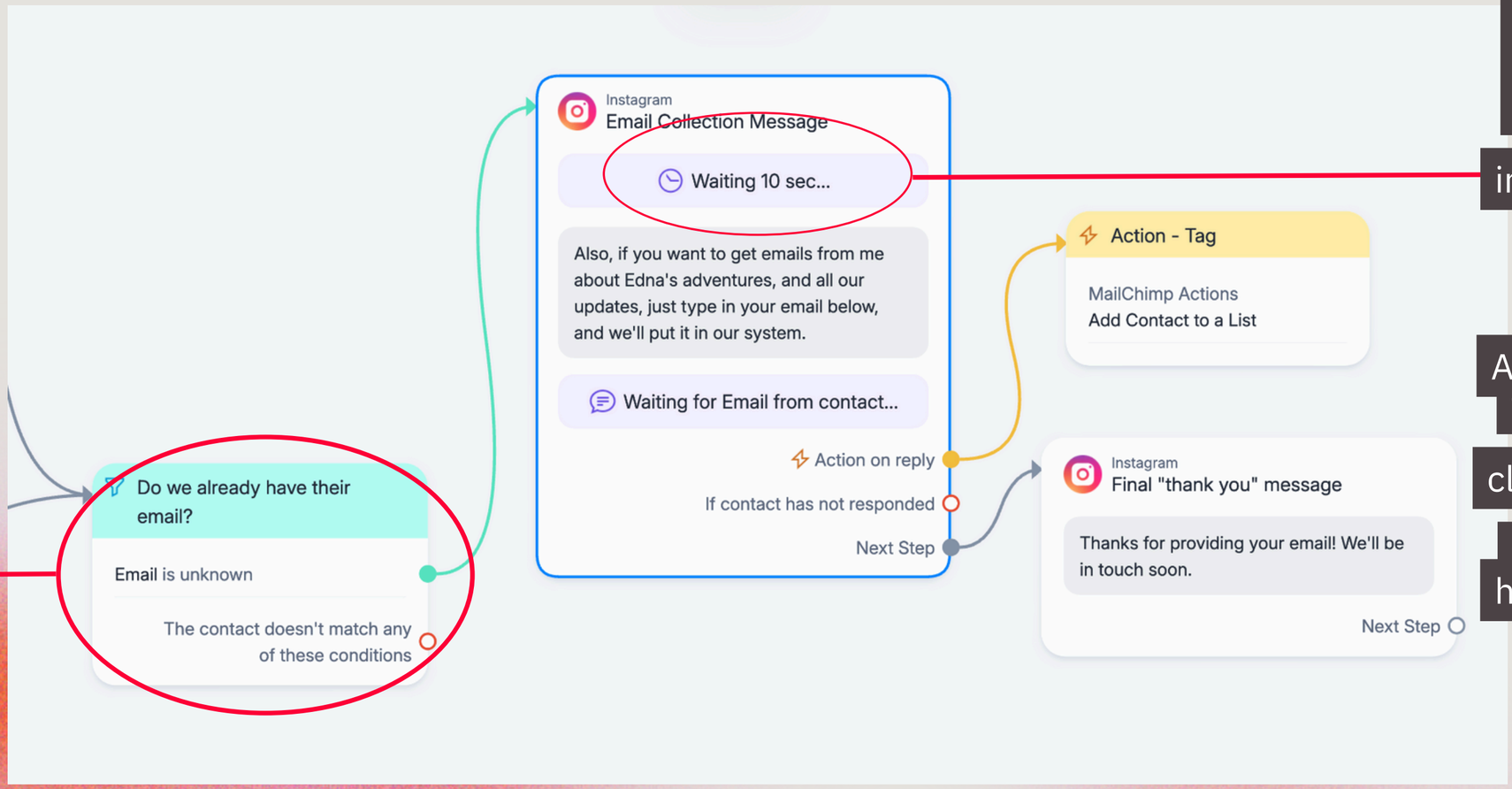


Now the bot will search for the tag “received default reply #1.” If the contact has that tag, they have already recieved default #1, but not #2, so their next step will be receiving the Default Reply #2 message. If the bot doesn’t find that tag, the contact will keep going and receive Default Reply #1 for the first time.

Appendix D

The End: Following Up with the Right Reople at the Right Time

This condition makes the bot ask whether we already have the contact's email address. If we do, we won't send them to the email collection flow, and the flow will end here.



Add a 10-20 second delay to this second message. Without a delay, this message would send immediately after the first one, without giving users an opportunity to read the first message. Adding a delay before the second message allows for users to click links and browse websites, or fill out forms before they're hit with a second ask.



REAL PEOPLE. REAL STORIES.

A Campaign Toolkit for Storytelling that Moves People

PORCH LIGHT. MEDIA

A guide for campaigns, causes, and organizations ready to find real people, capture authentic stories, and produce content that actually moves audiences.

TABLE OF CONTENTS

WHAT'S INSIDE

Introduction

- Who We Are
- Who This Toolkit Is For

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Work With Us

PORCH LIGHT. MEDIA



INTRODUCTION

INTRODUCTION

WHO WE ARE

PORCH LIGHT MEDIA is a full-service strategy, content, and production company led by **Amy Romanow, Ashley Bearden,** and **Miriam Arkin** — award-winning producers, directors, and strategists who've built campaigns and created content across politics, brands, film & TV, and non-profits at the highest levels.

What sets us apart is our unmatched expertise working with real people and real stories. We built the largest real people and stories program in political history across Biden (2020) and Harris (2024), and we've continued developing story programs for campaigns and IEs up and down the ballot.



BY THE NUMBERS:

Made **8 of the top 10** most persuasive ads for Harris in 2024

Made **the most effective ads** for Biden in 2020

Our work **moved vote choice by 4%+ across 3 cycles** — Nearly 3x the national average.

PORCH LIGHT. MEDIA

INTRODUCTION

WHO THIS TOOLKIT IS FOR

Campaign staff at any level who want to build or improve a storytelling program. Works whether you have a big budget and a dedicated team, or you're one staffer with an iPhone and a Google Sheet.

This toolkit is designed to be genuinely useful, not just inspirational. You'll walk away with frameworks, strategies, and action steps you can start implementing immediately.

HOW TO USE IT:

- Read front to back for the full playbook
- Jump to the section most relevant to where you are now
- Use the "First 30 Days" plan in Getting Started to get started fast
- Reach out to us via Work With Us if you want expert support


WORKING
WITH
STORIES

WORKING WITH STORIES

WHY STORYTELLING WORKS

THE PROBLEM:

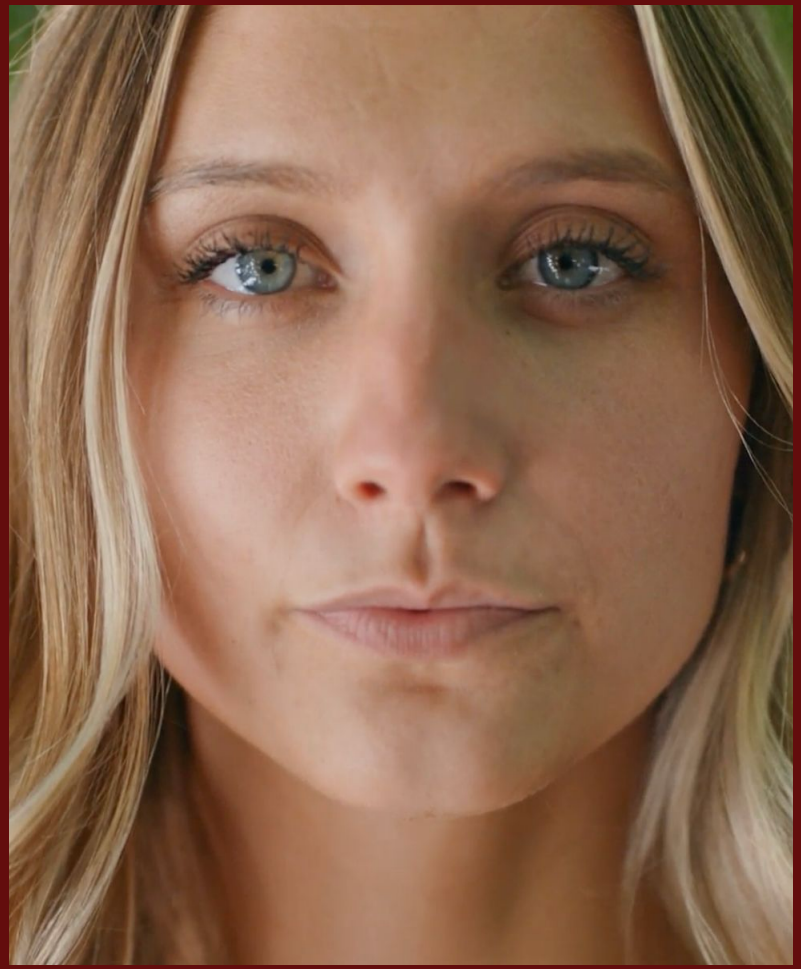
We're in an unprecedented attention crisis. People are bombarded with content, skeptical of institutions, and tuning out politicians, pundits, and talking heads. The audiences that have trended away from Democrats – working-class voters, young men, rural communities, Latino voters – are ones the party has struggled to persuade, not just reach.

THE SOLUTION: REAL PEOPLE

We know from extensive data that stories are the most powerful persuasion tool we have. And real people are by far the most effective messengers.

- **You trust and empathize with your neighbor** more than a politician
- **Stories bring abstract policy to life** and they make the stakes real and felt
- **Testimonials humanize shared experiences** (economic struggles, health care fears, feeling left behind)
- **Real people can deliver messages** that a candidate or random voice over can't or shouldn't

With skeptical and disengaged audiences, storytelling isn't just effective – it's essential. It's how we bring people in and move them to action.



WORKING WITH STORIES

YOUR STORYBANK SERVES YOUR ENTIRE CAMPAIGN

Your storybank is a campaign asset that serves every department. **The earlier you build it, the more utility it has.**

A storytelling program isn't just for paid media. The storytellers you find can be deployed across every department:

- **Paid Media:** TV, CTV, digital, radio, OOH
- **Social Media:** Organic social, UGC, platform-native content
- **Events & Surrogates:** Speeches, rallies, town halls, etc.
- **Earned Media:** Press conferences, op-eds, interview subjects
- **Speeches & Rollouts:** Weave real stories into remarks, policy announcements, launches & major moments
- **Rapid Response:** Deploy real people within days of news breaking


BUILDING
YOUR
STORYTELLING
PROGRAM

BUILDING YOUR STORYTELLING PROGRAM

SET UP YOUR STORYBANK

A storybank is your centralized casting catalog. When an opportunity arises – a new ad buy, a debate response, a speaker at an event – you search your bank first. If you don't have the right person, you go recruit.

CREATING YOUR DATABASE:

Storybanking doesn't need to be fancy. Google Sheets or Excel works. Track:

- **Name, contact info, location** (state, city, CD)
- **Story summary** (2–3 sentences)
- **Issue bucket(s)** (health care, cost-of-living, education, veterans, etc.)
- **On-camera viability notes** (telegenic? good communicator? natural warmth?)
- **Source** (how you found them)
- **Status** (new lead → pre-interviewed → vetted → filmed → shipped)
- **Point of contact and vetting status**

PRO TIP:

Log everyone, even people who aren't right for this moment. Someone you pass on in April could be exactly who you need in October.

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BUILDING YOUR STORYTELLING PROGRAM

DEFINE YOUR BUCKETS AND CASTING SPECS

ISSUE BUCKETS

Define the key themes that will be core to your narrative. These are your standing recruitment priorities: health care, cost of living, education, seniors + Social Security, small business, veterans, immigration, reproductive rights, etc.

CASTING SPECS

For each bucket, define the ideal messenger:

- **Demographics** (age, race, gender, geography)
- **Target audience** (who needs to hear this, and who will they relate to?)
- **Tone** (fiery? quiet and devastating? funny? matter-of-fact?)
- **Political identity** (an apolitical person is often more powerful than a partisan one)
- **Placement** (debate night show buy? TikTok? Rally or fundraising event?)

KEY INSIGHT:

It's a two-way process: sometimes the narrative drives the messenger (you need a health care story in Wisconsin). Other times you find an amazing person and their story drives where you deploy them. Stay flexible.

BUILDING YOUR STORYTELLING PROGRAM

FINDING YOUR STORYTELLERS: THE RELENTLESS RECRUITMENT STRATEGY

Finding the right storytellers requires creative sourcing from multiple channels at once.

YOUR OWN CAMPAIGN

Everyone on your campaign is coming across potential stories, even if they don't realize it. Field staff, organizers, event teams, social media managers, comms, fundraising.

- Brief your teams on what you're looking for
- Make it frictionless to flag a lead (a Slack channel, a shared form, a quick text)
- This is **not** adding work, it's simply noticing when a great story is right in front of them

PROGRESSIVE ALLIES AND PARTNERS

Which groups in your county, district, state, etc. do you already have existing relationships or want to build a relationship with that you can mine for storytellers? It's worth taking time to do a thorough brainstorm from the jump.

- Labor unions, health care advocacy groups, education groups
- Small business networks, community coalitions, faith orgs
- National orgs with public-facing, existing storybanks that you can mine

BUILDING YOUR STORYTELLING PROGRAM

FINDING YOUR STORYTELLERS: THE RELENTLESS RECRUITMENT STRATEGY (CONTINUED)

LOCAL MEDIA

Who was profiled on the 5pm news? Who wrote a letter to the editor? Local media is gold because you often get to see people on camera before you ever reach out.

ONLINE COMMUNITIES

- Facebook groups (e.g., “Girl Dads for Harris,” “MI Moms Helping Moms,” community groups, etc)
- Reddit, Twitter/X, TikTok – people share their stories publicly all the time
- State unemployment offices on social media (people literally post their hardship stories)
- GoFundMe campaigns related to your issue areas

“SHARE YOUR STORY” CAMPAIGNS

Work with your digital team to solicit stories:

- Geo-targeted digital ads asking people to share their experience
- Simple free surveys (Google Forms), “Share Your Story” page on your website
- Email/SMS asks to your existing lists

PRO TIP:

Even a modest ad spend surfaces leads. Keep copy simple and specific: “We’re looking for people in [STATE/CD] who have a story about [TOPIC].” Include a short intake form. Your team can geo-target by state, CD, or media market.

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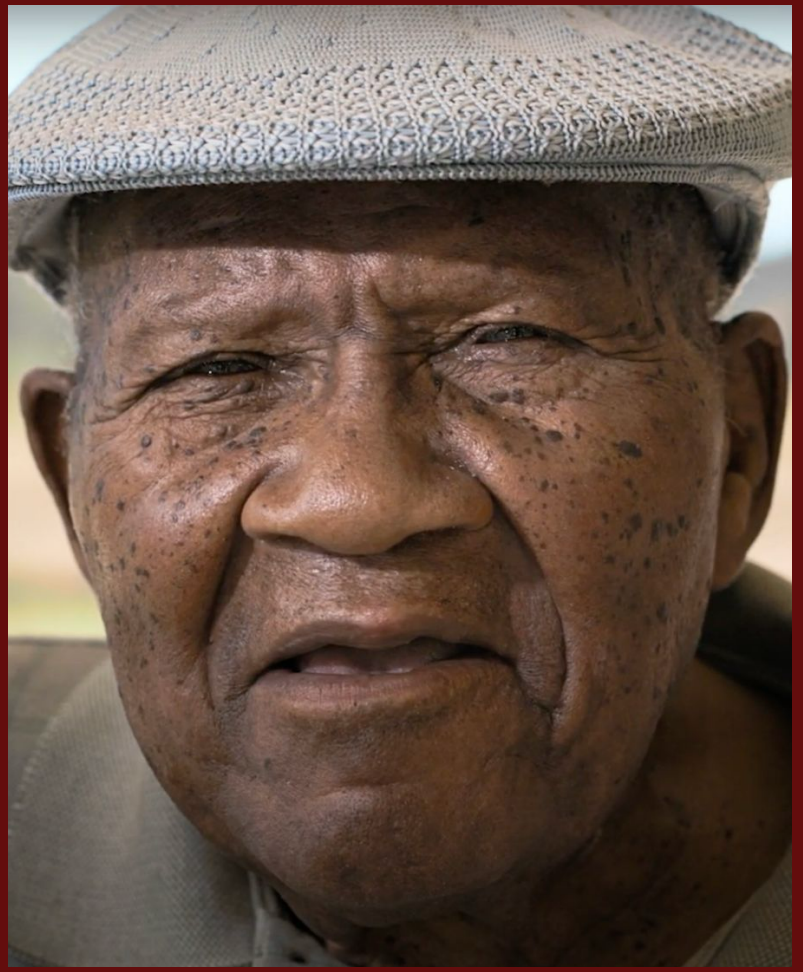
Go the Extra Mile.

Community events, county fairs, farmers markets. And always end every conversation with: “Do you know anyone else who has a similar story?”

That one question has surfaced some of our best storytellers.



BUILDING YOUR STORYTELLING PROGRAM

DEVELOPING YOUR STORYTELLERS

BEFORE YOU REACH OUT

Don’t waste time chasing unusable leads. Quick checks first: Can you find current photos/videos? Do they seem telegenic? Vibe check: do they feel relatable? Any immediate red flags?

THE PRE-INTERVIEW CALL (15-30 MIN)

- Let them tell their story in their own words. Listen for **how** they tell it, not just what they say
- Cover logistics: address, availability, comfort level with filming
- Touch on core messaging points (without putting words in their mouth)
- Jot down strong quotes and memorable phrases to inform your shoot packet
- Feel out red flags: camera comfort, alignment, potential issues

THE DECISION

Ask yourself: Will they connect with the target audience? Do they feel authentic? Are they right for this moment? **Be decisive but not impulsive.**

GREENLIGHT AND VET

- Draft a brief write-up for leadership, if required
- Work with your campaign to follow or devise vetting protocol and timing
- Share strong leads with other teams. Someone not right for video might be perfect for an op-ed

BUILDING YOUR STORYTELLING PROGRAM

BUILDING TRUST AND RELATIONSHIP

When you ask someone to become a storyteller it is a big ask. These are real people with no experience being public. They're nervous, they're being vulnerable, and they're doing this as an act of service.

BUILDING TRUST:

- Be honest about the process: this may or may not happen, timelines might shift
- Explain how their story will be used and where it might appear
- Acknowledge the vulnerability of what they're doing
- Be responsive – don't leave them hanging
- Maintain the relationship after filming: check in, thank them, keep them updated
- Give social media lockdown guidance before anything goes live
- Send the final cut 24-48 hours before content is released so they're not surprised

OUR PHILOSOPHY

Treat every storyteller the way you'd want someone to treat your loved ones if they were in this position. **Building trust isn't just the right thing to do – it leads to a dramatically better product.** People open up when they trust you. That's when powerful moments happen.

PRODUCING CONTENT WITH STORYTELLERS



THE SHOOT: LOGISTICS AND SET UP

LOGISTICS

Location: Film in the home whenever possible. It's cheap, easy, and authentic.

- Offer to pay for a cleaner. Assure them they do NOT need to tidy up – authenticity rules.
- Alternatives: Airbnb, park, their workplace, somewhere meaningful to their story

Priority: The interview is BY FAR the most important part. Prioritize it above all else.

B-roll: B-roll (footage of their life, surroundings, activities) is secondary, but valuable for the edit.

THE SHOOT PACKET

Interview Questions: The secret sauce. Reverse-engineer research and polling into conversational questions that yield on-message answers naturally. Ask yourself: "What question can I ask that will get the line I want, in their own words?"

Wild Lines: Your insurance policy. Short, tight messaging bites delivered at the end. Safety net if the interview didn't yield a clean enough version of a key message.

Scripts: Scripts can be helpful tools for speed and for scaffolding in the edit, but don't let them take you away from capturing realness and authenticity.

Shot List: Plan b-roll in advance. What shots will emotionally illustrate the story? Much easier to have a list than wing it on set.

PRODUCING CONTENT WITH STORYTELLERS

THE SHOOT: DAY-OF

PRO TIPS

- Do a real interview if you can. It's worth it. Gives you so much to play with in post and for your library of content.
- Two cameras if possible (even a cheap second cam on tripod). Makes cutting between takes dramatically easier.
- Collect personal photos and iPhone videos from the storyteller to add warmth and intimacy.
- Take copious notes during the shoot. Mark the strongest bites. Invaluable for post.
- Jot down pick-ups before wrapping – anything you want to revisit while you're still there.
- Don't forget to get your talent/media release signed!

CREATIVE APPROACHES

Testimonials don't have to be "person sits in chair and talks." When the airwaves are cluttered, something that feels different is a huge advantage:

- **Documentary style:** follow someone through their day
- **Social media-inspired:** GRWM (Get Ready With Me), day-in-the-life, etc.
- **Cinematic**: high production value when the story and moment warrant it
- **Scrappy:** sometimes iPhone-quality feels more real than polished production

PRODUCING CONTENT WITH STORYTELLERS

POST-PRODUCTION: TELLING THE STORY AND EDITING

AUDIO FIRST

- **Transcribe everything**. Start with paper edits from the transcript.
- **Start big and scale back**: first cut might be 3 minutes, keep paring down.
- **If budget is tight, try AI-assisted tools** (Trint, Descript) before hiring an editor.

VISUAL PHILOSOPHY

- **Show, don't tell.** Don't be heavy-handed with ominous VO or dramatic music.
- **Give people space to feel.** A good story and a good messenger do the heavy lifting.
- **Build around a moment**. A single pause, a laugh, a crack in someone's voice can carry an entire ad.

MAXIMIZE YOUR FOOTAGE

One shoot should yield multiple pieces:

- :60, :30, :15, :06. They don't need to be exact cutdowns. Different beats, different audiences, different placements
- Long-form for YouTube or press releases
- Social media cuts (vertical, captions, platform-native)
- Audio for radio/podcast ads
- Stills for direct mail, web, social
- BTS content for organic social

PRO TIP:

One shoot can and should yield 5–10+ pieces of content across formats. Plan for it from the start.

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PRODUCING CONTENT WITH STORYTELLERS

POST-PRODUCTION: DIGITAL AND PLATFORM TIPS FOR USER-GENERATED CONTENT

User-Generated Content (UGC) is cost-effective but can easily disappoint without the right guidance

TIPS FOR CREATING UGC AND SELF-TAPES

- **Provide clear, simple filming instructions** (lighting, framing, audio, background)
- **Give messaging guardrails**: key points to hit, not a full script; any hot buttons to avoid
- **Consider a virtual directing session over Zoom**
- **Use tools like VocalVideo or Greenfly** to standardize the process
- **Always review/edit the raw footage.** Don't just post what they send

WORKING WITH YOUR DIGITAL TEAM

- **Collaborate on platform optimization:** what formats/specs work for each placement
- **Test different cuts with different audiences;** refine based on data
- **Use paid campaigns to solicit new stories** (geo-targeted "Share Your Story" ads)
- **Plan for rapid response**: have stories ready to deploy when news breaks


BUILDING A
(MICRO)
INFLUENCER
PROGRAM

BUILDING A (MICRO) INFLUENCER PROGRAM

A DIFFERENT MODEL

Influencers often treat gigs like sponsored posts — one-offs. We believe in a different approach: one rooted in conversations, relationship building, and treating communication like a dialogue.

We call them “(Micro)Influencers” because they’re more “real people in-the-trenches with you” than brand ambassadors. Authenticity means genuine engagement with the audience — digging in, sharing personal stories, showing what you’re hearing and learning. This is how you turn passive viewers into advocates.

FINDING THEM

Same relentless sourcing, different lens: **whose online persona can we develop and grow?**

- Not necessarily your paid media storyteller — someone who’s hungry, engaged, and wants to expand their reach
- Someone whose community already trusts them
- Think: pastors, community health advocates, HBCU students, parent network leaders, small business owners with a social presence, and rural community voices

DEVELOPING AND SUPPORTING THEM

- **Analyze their existing content** and start from where they are
- **Train on campaign goals,** messaging, and strategy
- **Help them find their voice.** Don’t make them into something they’re not
- **Weekly/bi-weekly briefings:** messaging toplines, CTAs, area-specific activations
- **Q&A office hours** for ongoing support
- **Build camaraderie.** Help them feel part of something bigger

Consider a “team captain” structure: your strongest (micro)influencers can recruit, develop, and oversee their own teams. Community members lead outreach to their own communities, with a personal stake in the campaign’s success.

Fair compensation leads to better, more sustained engagement.
Consider: program stipends, access to equipment (mics, ring lights, CapCut), and training resources.



CASE STUDIES AND LESSONS LEARNED



CASE STUDIES AND LESSONS LEARNED

CASE STUDIES

A few examples of the kind of material this process produces.

Josh & Amanda: Not doing the standard script-in-a-chair thing. “Willow’s Box” (:60)

Kaitlyn: A Texas mom found through *relentless* online sourcing. A haunting photo led us to her. “Little Brother” (:30)

Cedric: Testimonials for rapid response are possible & powerful. We were on air in 72 hours during the “Losers & Suckers” scandal. Build your bank early! “Sergeant King” (:15)

Hadley: Play with social media trends in political content (e.g., GRWM). “Options” (:60)

Chris: Found our guy after weeks of looking for an authentic western PA voice. “Yinzer” (:30)

Geovanny: Be bilingual & microtarget when applicable (e.g., the goal here was to reach young Puerto Rican men in the Philly DMA). “Geo (ESP)” (:15), “What’s Best For Me (ENG)” (:15)

Ondrea: One shoot can produce endless content. “Ondrea’s Story” (2:30), “You Will Be Protected” (:60), “Scar” (:30), “Ceasar” (:15), etc.

Tina: Stretch your reach – don’t sleep on testimonials for radio. “Doggone It” (Rural Radio)

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CASE STUDIES AND LESSONS LEARNED

HARD-WON LESSONS: WHAT NOT TO DO

1. Don't wait. Start recruiting storytellers early. Scrambling when you need stories is a losing position.

2. Don't shame. Create "permission structures," don't needlessly bash the other side. An apolitical voice is often your most powerful.

3. Don't over-script. The unscripted, interview-driven approach yields more authentic, more effective content. Every time.

4. Don't skip vetting. Protect the campaign and the person.

5. Don't forget the human. This is vulnerable. Treat people with care. It's right AND it leads to better content.

6. Don't ignore the unscripted moment. A pause, a laugh, a crack in someone's voice — you can't script those. But you can create the right conditions for these moments to happen organically.

7. Don't produce one thing from a shoot. Maximize footage. One shoot = 5–10+ deliverables.

8. Don't chase drama over relatability. The person who feels like your neighbor is often more powerful than the most heart-wrenching story.

9. Don't write off testimonials for rapid response. If your storybank is built, you can deploy real people within days of news breaking.

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GETTING
STARTED

GETTING STARTED

YOUR FIRST 30 DAYS

You don't need a massive budget to start. Here's how to get a program off the ground:

WEEK 1: THE FOUNDATION

- Define your top 3–5 issue buckets based on your campaign's core message
- Write basic casting specs for each bucket
- Set up your storybank (Google Sheets is fine)
- Identify internal contacts who can surface leads

WEEK 2: ACTIVATE

- Brief field, coalitions, comms, and political teams on what to look for
- Create a simple intake system (Slack, email, etc)
- Start sourcing: Facebook groups, local media, partner orgs

WEEK 3: DEVELOP

- Begin pre-interview calls with strongest leads
- Start vetting top candidates
- Draft a brief on most promising storytellers for leadership

WEEK 4: PRODUCE

- Greenlight first shoot(s)
- Build shoot packet (interview questions, scripts, wild lines, shot list)
- Film your first storyteller

ADDITIONAL RESOURCES

We can provide storybank templates, pre-interview checklists, shoot day checklists, and more.

Reach out at: contact@porchlight.media

PORCH LIGHT. MEDIA

GETTING STARTED

WORK WITH US

This toolkit gives you the framework to get started. If you want expert support at any stage, that's what we do.

WHAT WE OFFER

- Full storytelling program strategy and design
- Storybanking: finding, vetting, and developing storytellers at scale
- End-to-end production: from pre-interview to final delivery
- (Micro)influencer program development and management
- Training and consulting: we'll teach your team to run it themselves
- Creative direction and platform optimization

GET IN TOUCH

We'd love to hear what you're working on.

Email: contact@porchlight.media

Website: porchlight.media

Vimeo: Porch Light Media

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5

DEPARTMENT RESOURCES

Cybersecurity Guidance for Campaigns

Why cybersecurity matters

Campaigns are at risk of compromise from a variety of bad actors. These could be nation states disrupting our democracy, cybercriminals with financial motivation, and sometimes even people opposed to a candidate. The cost of securing your campaign is more affordable than the financial, reputational, and legal fall out of being the victim of a cyberattack.

This section of the playbook is designed to help campaigns of any size determine the best strategy for managing and reducing cybersecurity risk. Each campaign will carry different types of risk, so it is crucial to make these considerations as early as possible.

Getting Started: Threat Modeling

What is a threat model?

Threat modeling is a key part of the risk management process for organizations and campaigns, as it helps to identify potential vulnerabilities and threats before they can be exploited, allowing organizations to implement effective mitigation strategies and reduce their risk of a security breach. Consider the types of cybersecurity threats that you may face during the cycle.

Every campaign should start by asking: *what could disrupt our campaign operations, compromise our data, harm our staff or volunteers, or undermine our credibility?* From there, the campaign should identify tactical steps to reduce those risks.

When building your threat model, consider the following categories:

1. Cybersecurity threats

   Political organizations are vulnerable to cyber attacks, such as hacking and phishing, which can compromise sensitive data and harm their operations.

2. Physical threats

   Political organizations and their members can also be at risk of physical harm from extremist groups or individuals who are opposed to their beliefs and activities.

3. Financial threats

   Political organizations rely on donations and funding to support their operations, and they may face financial threats such as embezzlement or fraud.

4. Reputation threats

   Negative publicity, scandals, and controversial statements or actions can harm the reputation of political organizations and undermine their credibility.

5. Legal threats

   Political organizations may face legal challenges and investigations, such as accusations of campaign finance violations, which can result in fines or even criminal charges.

6. Electoral threats

Political organizations that participate in elections can face challenges such as voter suppression, voter intimidation, and other tactics aimed at manipulating election outcomes.

7. Internal threats

   Political organizations can also be threatened by a person who has authorized access to its systems, data, or information, such as an employee, contractor, or business partner. This person has legitimate access to the organization's resources and may use their access to intentionally or unintentionally cause harm to the organization.

Best Practices: Cybersecurity

The DNC recommends all campaigns adopt a “secure by default” approach, which means security practices are built into your operations from the beginning – not after problems occur!

Cybersecurity includes the *people* who use tools, as well as the *processes* they follow to do so. The goal is to reduce any risks of hacked accounts, data leaks, or unauthorized access to internal campaign systems.

The steps below outline how campaigns should implement core cybersecurity protections:

1. Multi-factor authentication (MFA): ***Every*** platform and device used by the campaign should have a form of multi-factor authentication enabled. MFA adds a powerful layer of security to your accounts — if your password is hacked or phished, this second layer of approval helps keep your accounts safe. Select the strongest form of MFA in the following priority order:
    a. Passkeys: Passkeys are an easier and more secure alternative to passwords. They let you sign into accounts with your fingerprint, face scan, or screen lock. They’re stored on your local device, and they cannot be guessed or reused.
    b. Security keys: Use security keys whenever possible because all other forms of MFA are phishable. We recommend Yubikeys and Google Titan Keys. Make sure your security keys support NFC so that you can use them with your phone. Please see the security keys section below for more details.
    c. Authenticator App: These apps generate a 6 digit code that changes every 30 seconds and verifies your identity. Google Authenticator & Duo are examples.
    d. Email: Email is only recommended if your email has MFA configured as well.
    e. SMS/text messages: Avoid SMS/text message as your MFA unless it is the only option. Ensure you have a long, random, unique password if so

2. Cybersecurity Checklist: Every new hire should complete the checklist for all of their work and personal accounts within the first week. https://democrats.org/security/

3. Password Manager: Password managers such as Keeper and 1Password help create, store, and enter login credentials for you. This additional layer of security should be required for all staff before they are given login credentials to any of your systems. Password managers, like all applications, should be secured with MFA for each user, ideally with multiple hardware security keys.

4. Passphrases versus Passwords: Create a strong master password by using a passphrase. We also recommend a passphrase for anything you have to type in frequently (like your Netflix password). Having a strong passphrase is especially important for your most critical applications, such as email and your password manager.
    a. Sample strong passphrase: *worshiper favoring visa nest*

5. Training: Cybersecurity training should be conducted at the beginning of the onboarding process. Consider hosting small group or 1:1 sessions for your highest risk individuals, especially those who are not technically proficient.
    a. [Sample Cybersecurity 101 Training Deck]

6. Security keys: Security keys should be procured for every new hire in advance of their onboarding so they can configure them when they are given login credentials to your systems. For all Federal campaign committees and some other eligible campaigns, Defending Digital Campaigns provides promo codes for Yubico Keys and Google Titan Keys through : https://defendcampaigns.org/. Please reach out to see if your campaign is eligible.

7. Vendors: As part of the Contracts process, Vendors should submit information on their cybersecurity practices for review. This process, often referred to as “Third Party Risk Management” or TPRM, is critical to ensure that the companies you entrust with your data are meeting your expectations around security.
    a. Sample: DNC’s Vendor Security Questionnaire

8. Advanced Protection: Many vendors offer some form of “Advanced Protection Plan” or “Advanced Data Protection. Examples include Google and Apple. Review what options are available for all your technology vendors, some of them may surprise you. Many ISPs have similar programs to prevent changes to Internet services, for example.

Best Practices: Device Security

At the end of the day, the most important link in the chain of protecting your campaign's data is on the phone, tablet, or computer that is used to access that information. Often covered by the generic term of "endpoint security", how you protect these devices will be critical to the success of your overall cybersecurity program.

- Keep devices up to date. In the past, it could be weeks, months, or even years between when a new vulnerability is discovered and when it becomes actively exploited by malicious actors. Today, thanks to new tools and techniques, the window has shrunk down to days, if not hours. As such, it is important that you stay on top of security patches for your equipment, and don't allow users to ignore such updates. Detailed instructions are contained in the Security Checklist.

- Enable "Find my device". All major OS vendors have the ability to track a device, so should it be stolen or otherwise "go missing" you can find it. Make sure that you have these features enabled with some central account able to track the machines (and disable them if needed). Detailed instructions are contained in the Security Checklist.

- Set a Pin. This is true on both the device as well as the mobile service provider, set a PIN. Don't allow access to the device without a password of some kind, and don't allow someone to change the mobile services for a device without a PIN of some kind. Detailed instructions are contained in the Security Checklist.

Best Practices: IT Office Setup Guidance for Campaigns

As you stand up the campaign's processes, also be thinking through offboarding and shutdown, to avoid financial and logistical ramifications. If financially feasible, it is highly recommended that the campaign provide laptops to all staff. This allows for more control over data and reduces the campaign's risk significantly.

Questions to Consider Before Finalizing Contract for Space

- What ISP (internet service provider) is already available in this building for immediate service activation?
- Is the building willing to accept packages on behalf of the leaseholder?
- Are there building access controls? Is the building locked or open to the public? Is there a front desk with a guard?

Internet Installation Day Considerations

- Ask the installation tech to help determine the best place for the router (don't put it in the basement).

- Change the password immediately after the internet is set up. Keep the internet name and password in a password manager. Do not print it and tape it to the walls.
- Confirm the firewall is activated.

What to Purchase

Router options:

- Meraki Go — less than $1,000 per office, plug-in and go
- Meraki MX75 Firewall/Router (~$600) and Meraki MR36 Wireless Access Point (~$700)
- Ubiquiti Unifi Express or Dream Router ($150-$199)

Additional equipment:

- 1GB internet speed (Coax/Broadband Connection or Fiber)
- Abode Security System (door sensors, motion sensors, cameras, keypad, 24/7 Alarm center subscription)
- Printers — Canon imageCLASS series recommended for both color and black & white
- Office Phones — Anker PowerConf for bluetooth speakerphone, or Poly Trio 8300 for VOIP

Pro Tip 💡:
The links to purchase all of these items are available in the Resource Library.

Physical Security Best Practices

Why physical security matters

Political campaigns operate in highly visible environments, and in a highly polarized political climate, staff and volunteers can be exposed to physical safety risks. Every campaign has a responsibility to prepare for these risks in advance, to ensure all staff and volunteers are protected, and to maintain the continuity of operations if an incident does occur at any point in the campaign cycle.

As such, physical security should be treated as a core responsibility of the operations function – with clear ownership and procedures shared clearly across the organization.

Organizations can follow many of the same processes, procedures, and response plans that may already exist for cybersecurity and tailor them to the physical security threat, including planning in advance and taking steps to make things harder for adversaries to succeed.

This document is meant to start a conversation and help prioritize items for your organization to address.

Assigning ownership for security planning

Every campaign, of any size, should designate a staffer responsible for overseeing physical security. The specific staffer who owns this work will depend on the size of the organization:

- Coordinated / statewide / mid-size campaigns: this security planning is typically owned by the Operations Department / Leadership teams
- Smaller campaigns: on campaigns that do not have an Operations Department, a member of the campaign leadership team should take on this responsibility, ensuring that protocols and response plans are in place.

Note: Check with your organization's leadership and legal team when creating/updating processes. These are suggestions only.

Best Practices:

- The safety and security of staff is always #1. As always, if you or your colleagues feel there is an immediate threat, please contact law enforcement immediately.
- Keep your staff contact list up-to-date. You need to make sure you have the most up to date contact information for all staff in case of an emergency.
- Identify evacuation routes and rally points for every office. Designate an office captain per office who will review all procedures with new teammates working out of the office and remind staff about protocols.
- Reiterate key procedures to staff throughout the cycle, such as the incident reporting email address and rally points. All protocols should be easily accessible by all campaign staff.

Where to start:

- Talk to your organization's leadership about physical security and emergency preparedness, including the following key items:
    - Create your Incident Response Team (IRT) *(typically: Leadership, Operations Director, Communications Director, IT Director)* and keep their contact info readily accessible
    - Create a Threats Reporting Process. All teams should be trained to report threats and safety concerns to a designated threats email in addition to alerting the security/leadership team.
    - Create an Incident Report Form template to be used in case of an incident, for the purposes of documenting the incident, police report #s and actions taken
    - Set a "rally point" outside each office, where staff should gather, so you can easily locate them
    - Train/talk to staff about emergency preparedness and incident protocols/procedures
    - Test your new processes, especially with members of the IRT, to ensure everything is working properly and get IRT team members familiar with the process

- Establish Office Captains
    - An office captain is an individual designated to be in control of an emergency in their office or area of responsibility. The main purpose of this group is the safe removal of assigned personnel and visitors from the emergency and away from the area, up to and including evacuating the building.

Ongoing actions

Security practices should be continually evaluated and reinforced throughout the course of a campaign. Leadership responsible for overseeing security should keep the following in mind:

- Scheduling training refreshers/reminders of emergency preparedness/incident response protocols/procedures
- Updating emergency/incident protocols when things change

Resources & References

Physical Security Guidance for Democratic Organizations	Physical Security Guidance for Democratic O...
Physical Security: Tactical Best Practices	Physical Security: Tactical Best Practices

Emergency Response Team Manual	Emergency Response Team Manual
Threats Reporting	Threats Reporting
Incident Report Form	Incident Report Form.docx
Events Security Checklist [Sample]	Events Security Checklist [Sample]

Playbook Link and Resource Library

#	Resource / Display Text	URL
1	Winnable Team	info@winnable.app
2	Openfield Team	sales@openfield.ai
3	Matchbook Team	info@indigo.engineering
4	Out Organize Team	info@outorganize.com
5	Sample Hiring Tracker	https://docs.google.com/spreadsheets/d/1OunF-WuiRpiDGbN782d56E5Ou7xEfhqI...
6	Trestle Collaborative	https://www.trestle.us/
7	Arena: Creating a Team Agreement	https://arena.run/tool/creating-a-team-agreement
8	Core Competency Rubric	Organizing Core Competency Tracker
9	Arena: Hiring Guide	https://arena.run/tool/hiring-guide
10	Arena: Applicant and Interview Tracker	https://arena.run/tool/applicant-and-interview-tracker
11	Arena: Embracing Equity & Inclusion on Campaigns	https://arena.run/tool/embracing-equity-and-inclusion-on-campaigns
12	GAIN Hiring/Interviewing Tips	https://docs.google.com/document/d/1RCy1Ddbzxtz_sqAJAdixQo_BDwqilyhLelSF...
13	DNC Local Listeners Materials	democrats.org/local-listeners.

IT, Cybersecurity & Physical Security Guidance for Campaigns

#	Resource / Display Text	URL
1	DNC Security Page	https://democrats.org/security/
2	Cybersecurity Checklist	democrats.org/security-checklist
3	Sample Cybersecurity 101 Training Deck	https://docs.google.com/presentation/d/1qywpKMm-l2M6LjHI9C02jrZeJ40TEIIi...
4	Defend Campaigns	https://defendcampaigns.org/
5	Sample: DNC's Vendor Security Questionnaire	https://docs.google.com/document/d/1_IDa67LuoXOyehPtH8bmY8Nn4rcfNfJZxJDr...
6	Meraki Go	https://www.meraki-go.com/product/meraki-go-complete/?ctry=us
7	Meraki MX75 Firewall/Router	https://meraki.cisco.com/product/security-sd-wan/small-branch/mx75/

#	Resource / Display Text	URL
8	Meraki MR36 Wireless Access Point	https://meraki.cisco.com/product/wi-fi/indoor-access-points/mr36/
9	Unifi Express	https://store.ui.com/us/en/pro/category/all-unifi-cloud-gateways/product...
10	Dream Router	https://store.ui.com/us/en/pro/category/all-unifi-cloud-gateways/product...
11	Abode Security System	https://goabode.com/
12	Xerox C310 Printer	https://www.xerox.com/en-us/office/printers/xerox-c310-printer
13	Canon imageCLASS MF753Cdw II	https://www.bestbuy.com/product/canon-imageclass-mf753cdw-ii-wireless-du...
14	Canon imageCLASS LBP646Cdw	https://www.bestbuy.com/product/canon-imageclass-lbp646cdw-wireless-dupl...
15	Canon imageCLASS D1650	https://www.bestbuy.com/product/canon-imageclass-d1650-wireless-black-an...
16	Canon imageCLASS LBP246dw	https://www.bestbuy.com/product/canon-imageclass-lbp246dw-wireless-black...
17	Anker PowerConf Speakerphone	https://www.bestbuy.com/site/anker-powerconf-bluetooth-speakerphone-conf...
18	Physical Security Guidance for Democratic Organizations	Physical Security Guidance for Democratic Organi...
19	Physical Security: Tactical Best Practices	Physical Security: Tactical Best Practices
20	Emergency Response Team Manual	Emergency Response Team Manual
21	Threats Reporting	Threats Reporting
22	Incident Report Form	Incident Report Form.docx
23	Events Security Checklist [Sample]	Events Security Checklist [Sample]
24	DNC Tech Community Support	tech-community@dnc.org
25	DNC CEVP Data and Tech Director for Tool & Documentation Access	porterd@dnc.org
26	Community Resource Site	dnctechcommunity.com

Digital and Mobilization Resources

#	Resource / Display Text	URL
1	FactPost on Twitter	http://twitter.com/factpostnews
2	FactPost on Facebook	http://facebook.com/factpost
3	FactPost on Instagram	http://instagram.com/factpostnews
4	FactPost on Bluesky	http://bsky.app/profile/factpostnews.bsky.social
5	The Democrats on Twitter	http://twitter.com/thedemocrats
6	Democrats on Facebook	http://facebook.com/democrats
7	The Democrats on Instagram	http://instagram.com/thedemocrats
8	Democrats.org	http://democrats.org
9	The Democrats on Threads	http://threads.com/@thedemocrats
10	Democrats on TikTok	http://tiktok.com/@democrats
11	Political Emails Archive	https://politicalemails.org/
12	Facebook Ads Library	https://www.facebook.com/ads/library/
13	Tech Community Email	tech-community@dnc.org
14	IWillVote.com	http://iwillvote.com
15	Relational Organizing Program & Workflow Details	https://docs.google.com/document/d/1XLeRiVvoeVgLfyf-6XfvpYqSlp31r9px1uZp...
16	Example UTM Source Code Builder	https://docs.google.com/document/d/1CMqUPJbs_6fMCqEHxvyWjl7jLZHfeWIoDM6t...
17	Example Text Campaign Tracker	https://docs.google.com/spreadsheets/d/108vIFUD1S0dgIQKIa272pg5Me2stEt2W...
18	Scale to Win Dialer Training (Virtual Phone Banks)	https://docs.google.com/presentation/d/1BOd8mXvtUZ_YHFmqOUZEcnL8aGBx2Cd2...
19	Zapier	https://zapier.com/
20	Monday.com	http://monday.com
21	Creator Partnerships Contact	reinm@dnc.org
22	Democrats on Bluesky	https://bsky.app/profile/democrats.org
23	Creator Touchpoints	Democrats.org/Creator-Signal ; Democrats.org/Creator-Clips